

**UNIVERSITY OF UTAH  
APPLICATION FOR SCHOLARSHIP/FELLOWSHIP  
INSTRUCTIONS**

If you are using the electronic version of the application for Scholarship/Fellowship form, you must ensure that each form has a new SFXXXXXXXX number. When you bring up the form there will be an SFXXXXXXXX number in the upper right-hand corner. If this number doesn't appear, try using a different browser or update your Acrobat Reader to the latest version for your browser. The form works best in Internet Explorer. *Each new form needs a new number.* To get a new number please press reset, or close the form and reopen it. **Do not modify an existing form and send it in with the same number.** If you are having problems accessing the electronic form, the Grants & Contracts Accounting department has paper copies of the form available by calling 581-7343.

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**A. RESTRICTIONS**

1. A scholarship/fellowship recipient must be either a post-graduate fellow or a graduate or undergraduate student working toward a degree. A student working toward a degree must be currently enrolled, and enrolled each semester in which the scholarship/fellowship is paid. If the student drops out of school for a semester, the conditions upon which the scholarship/fellowship was granted have been negated and the scholarship/fellowship should be cancelled immediately.
2. This scholarship/fellowship must be made for the purpose of furthering the recipient's education and cannot be conditioned upon services being rendered to the University, either past, present or in the future. If these conditions change, the scholarship/fellowship should be cancelled immediately and the department should take appropriate steps to pay the recipient for services rendered through the University payroll system.
3. Since a scholarship/fellowship cannot be used as the method to pay for services rendered, a scholarship/fellowship payment does not create an employer/employee relationship.
4. Scholarships/fellowships paid from an award from the Public Health Service and/or other federal agencies must attach a "Statement of Appointment of Trainee," Payback Agreement" and "Delinquency on Federal Debt," if required, to this application. The dates and amounts on these two forms must agree.
5. All scholarship/fellowship payments on contracts and grants must be authorized by the awarding agency.

6. Scholarships/Fellowships cannot be paid from State Appropriated funds. (Funds 1001 and 6100).

**B. COMPLETION OF FORM**

**1. Section I – Recipient Information**

Please complete all items to facilitate the timely processing of the scholarship/fellowship.

Non-resident aliens are required to complete the “Foreign Visitors Data Collection Form” in the Tax Services Office. Payment cannot be made until this form is completed. To make an appointment, verify information or receive instructions on what documents to bring, call Tax Services at 581-5414.

**TAXES WITHHELD:** In the event the non-resident alien does not choose to meet with the Tax Services Office and/or does not qualify for an exemption, 14 percent of the scholarship/fellowship amount will be withheld and remitted to the Internal Revenue Service.

**2. Section II – Payment Information**

All information in this section is important to avoid problems with the payment of the scholarship/fellowship. This information will affect the total amount paid to the scholarship/fellowship recipient as well as the number of payments the scholarship/fellowship recipient will receive. If you complete Section II, do not use Section III.

Scholarship/Fellowship payments can be made as a one-time payment, or multiple (recurring) payments. See below for examples of how to complete Section II for the various payment types.

**ONE-TIME PAYMENTS**

**One-time payments are not subject to the 15<sup>th</sup> of the month deadline, as the recurring payments are.** For one-time payments, you have the option of paying the recipient as soon as possible (within 12 working days), or you can postpone the one-time payment until a later date. If you wish to have the payment as soon as possible, fill out the “Start Date” and “End Date” fields, and the amount you want to pay in the “First Month” section. By entering an amount in the “First Month” section this will automatically update the “Total Amount To Be Paid”. Leave the “Equal Payments” and “Last Month” sections blank.

One-time payments may be mailed directly to the recipient’s home address. Recurring checks must be mailed to the sponsoring department in order to verify eligibility. Recurring payments may also be set up as a direct deposit to a recipient’s bank account. Please refer to the direct deposit form and instructions for more information.

**Example One – One-time payments – to receive payment as soon as possible**

Start Date: 01/01/03 \_\_\_\_\_ End Date: 01/31/03 \_\_\_\_\_  
First Month: \_\_\_\_\_ @ \$ 30,000.00 \_\_\_\_\_  
Equal Payments: \_\_\_\_\_ @ \_\_\_\_\_ = \$ \_\_\_\_\_  
Last Month: \_\_\_\_\_ @ \$ \_\_\_\_\_  
TOTAL AMOUNT TO BE PAID: \_\_\_\_\_ \$ 30,000.00 \_\_\_\_\_

If you wish the payment to be released at a later date, fill out the “Start Date” and “End Date” fields, and *fill out the “First Month” section to reflect the month in which you wish the payment to be released.* By entering the one-time payment amount in the “First Month” section, you automatically update the “Total Amount To Be Paid”. Leave the “Equal Payments” and “Last Month” sections blank.

For one-time payments that are not consecutive, you must submit a **separate** scholarship/fellowship form for each payment.

### **Example Two – One-time payments – when you wish payment to be released at a later date**

Start Date:	<u>02/01/03</u>	End Date:	<u>05/31/03</u>
First Month:	<u>April 2003</u>	@	<u>\$ 30,000.00</u>
Equal Payments:	<u>      </u>	@	<u>      </u>
Last Month:	<u>      </u>	@	<u>\$</u>
TOTAL AMOUNT TO BE PAID:			<u>\$ 30,000.00</u>

### **MULTIPLE (RECURRING) MONTHLY PAYMENTS**

For multiple monthly payments, divide the total amount to be paid by the number of months you wish the recipient to receive the payments. Payments must be *equal amounts* for each monthly payment. The only exception to this will be the first and last month’s payments, which don’t need to be the same amount as the equal payments in-between. (See Example Three)

### **Example Three – Monthly (Recurring) payments – Equal Payment Amounts**

Start Date:	<u>01/01/03</u>	End Date:	<u>12/31/03</u>
First Month:	<u>January 2003</u>	@	<u>\$ 2,500.00</u>
Equal Payments:	<u>  10  </u>	@	<u>\$2,500.00</u>
Last Month:	<u>December 2003</u>	@	<u>\$ 2,500.00</u>
TOTAL AMOUNT TO BE PAID:			<u>\$ 30,000.00</u>

### **Example Four – Monthly (Recurring) payments - Different payment amounts in the first and last months**

Start Date:	<u>01/01/03</u>	End Date:	<u>12/31/03</u>
First Month:	<u>January 2003</u>	@	<u>\$ 2,000.00</u>
Equal Payments:	<u>  10  </u>	@	<u>\$2,700.00</u>
Last Month:	<u>December 2003</u>	@	<u>\$ 1,000.00</u>
TOTAL AMOUNT TO BE PAID:			<u>\$ 30,000.00</u>

### **PERIODIC PAYMENTS**

This payment plan should be used for all payment types other than the one-time and monthly payments. For example, when you want the recipient to receive quarterly payments.

**Example Five – Periodic payments**

Start Date:	<u>01/01/03</u>	End Date:	<u>12/31/03</u>	
First Month:	<u>January 2003</u>	@	<u>\$ 7,500.00</u>	
Equal Payments:	<u>2</u>	@	<u>\$7,500.00</u>	= <u>\$ 15,000.00</u> (June, Sept) *
Last Month:	<u>December 2003</u>	@	<u>\$ 7,500.00</u>	
TOTAL AMOUNT TO BE PAID:			<u>\$ 30,000.00</u>	

\*Indicate months in which you would like the payments to be received. The same rule applies on the equal payment section in this example. Only the first and last month’s payments may be different from the equal payments in-between.

**For any changes in Section II it will be necessary to terminate the existing scholarship/fellowship on one form and submit a new scholarship/fellowship application.**

**3. Section III – Termination**

If a scholarship/fellowship is to be terminated prior to the original end date, this section should be completed by indicating the termination date and activity/project where the costs were being charged. Section I and Section V must also be completed to validate a new end date. If you complete Section III, do not use Section II.

**4. Section IV – Recipient Certification/Acknowledgement**

The recipient of the scholarship/fellowship must sign this scholarship/fellowship application. If the recipient cannot certify and acknowledge the conditions under which this scholarship/fellowship is made, he/she should not sign this form or receive this scholarship/fellowship. Any alterations of this certification and acknowledgement will result in the scholarship/fellowship application being rejected.

**This certification and acknowledgement must not be signed by any person other than the scholarship/fellowship recipient.**

In order to meet tuition deadlines, departments may obtain the recipient’s certification and signature on a separate page attached to the completed Scholarship/Fellowship form. If you choose this method, you must include the following information on the signed certification:

(1) The complete and exact “Recipient Certification/Acknowledgement” statement in Section IV must be typed on the attachment for the student to sign and accept the conditions of the agreement. (2) Amount to be paid. (3) Include all semesters for which you anticipate the student will be receiving payment: this will enable you to use the separate certification for any future payments included on the certification.

**5. Section V – Authorizations**

The department chairperson or responsible person (PI) and the dean of the college must sign this form. These signatures authorize the payment of the scholarship/fellowship and approve the

scholarship/fellowship charge to the listed chartfield. In addition, by signing this form, they **certify that no services to the University, past, present or future are required from the recipient.**

If the scholarship/fellowship payment comes from a contract or grant, the initiating department must also obtain the approval from the Office of Sponsored Projects.

### **C. ROUTING**

The initiating department must obtain the recipient's signature, the department chairperson or responsible person's signature, the approval from the dean and the approval from the Office of Sponsored Projects if the payment is on a contract or grant. If you use the electronic form, make a copy for your files and submit the original to Grants & Contracts Accounting, 406 Park Building. If you use the four-part form, retain the goldenrod copy for your files and submit the remaining copies to Grants & Contracts Accounting.

### **D. PROCESSING AND PAYMENT**

For **recurring payments** Grants & Contracts Accounting must receive the Scholarship/Fellowship form by *the 15<sup>th</sup> of the month **preceding** the month for which you want the first recurring payment to be received.* For example, if you want the first payment to be received in December, Grants & Contracts Accounting must have received the form by November 15<sup>th</sup> at the latest. All recurring payments are paid on the 1<sup>st</sup> working day of each month. The checks are mailed the same day they are cut, so you can expect your checks within 2-3 working days. Recurring checks must be mailed to the sponsoring department in order to verify eligibility. Recurring payments may also be set up as a direct deposit to a recipient's bank account. Please refer to the direct deposit form and instructions for more information. For one-time payments the check may be mailed directly to the recipient's home address. For **one-time payments** you have the option of paying the recipient as soon as possible (within 12 working days), or you can postpone the one-time payment until a later date.

**If you have any questions on how to complete the Scholarship/Fellowship form, please call Grants & Contracts Accounting at 581-7343.**