

# SCHOLARSHIP/FELLOWSHIP/TRAINEESHIP PAYMENT REQUEST FORM CHECKLIST & INSTRUCTIONS

## Section I: Scholarship/Fellowship/Traineeship Checklist

This section provides a quick summary of the Scholarship/Fellowship/Traineeship process in checklist format. See section II for a more detailed discussion of the Scholarship/Fellowship/Traineeship form, ePR process and Scholarship/Fellowship/Traineeship payment request concepts.

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## Scholarship/Fellowship/Traineeship Checklist

|          |   | Scholarship/ renowship/ frameeship checklist  |  |  |  |  |  |
|----------|---|---|--|--|--|--|--|
| Scholars | hip/Fellow  | ship/Traineeship PDF Form   |  |  |  |  |  |
| 0        | Section I – Recipient Information   |   |  |  |  |  |  |
|          |   | Obtain payee UID or SSN. Provide a W9 if the payee name and address is not verifiable in any other way. A W9 is not required when a UID is provided.                                    |  |  |  |  |  |
|          |   | Obtain a completed Recurring Direct Deposit Authorization Form whenever three or more payments are  |  |  |  |  |  |
|          |   | requested. Non-resident aliens are not required to use direct deposit, however.  For non-resident aliens, ensure GLACIER information is complete. Contact Tax Services for details.     |  |  |  |  |  |
|          |   | · · · · · · · · · · · · · · · · · · ·   |  |  |  |  |  |
|          |   | Ensure that this form is the correct payment method especially if the payee is an employee or currently   |  |  |  |  |  |
|          |   | enrolled and matriculated student. See the <u>Educational Payments Decision Document</u> for more detail.   |  |  |  |  |  |
|          |   | Ensure that no services past, present or future will be expected as a result of this payment. Process the   |  |  |  |  |  |
|          |   | payment through Payroll if services are required. Note that NIH Kirschstein-NRSA awards allow up to 25%   |  |  |  |  |  |
|          |   | employment in part time research, teaching, or clinical employment when it enhances the education of the trainee, but this must be separate from the traineeship payment and agreement. |  |  |  |  |  |
|          |   | Enter the department address.   |  |  |  |  |  |
| 0        |   | I – Payment Explanation   |  |  |  |  |  |
|          |   | Provide a brief explanation for what this payment is for.   |  |  |  |  |  |
|          |   | For department funded scholarships and fellowships, also attach a copy of the award letter.   |  |  |  |  |  |
| 0        | Section III - Payment Information   |   |  |  |  |  |  |
|          |   | Determine the date of the initial payment, the first recurring payment and the last payment.  |  |  |  |  |  |
|          |   | Calculate the amount of the initial payment and the breakdown between chartfields.  |  |  |  |  |  |
|          |   | For a single payment, ignore the recurring payment section. For two payments, submit two forms and two  |  |  |  |  |  |
|          |   | requests in <u>ePR</u> .  |  |  |  |  |  |
|          |   | For three or more payments complete the recurring payment section.  |  |  |  |  |  |
|          |   | ☐ Calculate the recurring amount to be paid each month for the duration of the contract.  |  |  |  |  |  |
|          |   | ☐ Calculate the amount remaining for the final payment.   |  |  |  |  |  |
| 0        | Section IV – Attestation  |   |  |  |  |  |  |
|          |   | Obtain the signature of the account executive, primary investigator, approved alternate or organizational head  |  |  |  |  |  |
|          |   | indicating agreement with the attestation on the form.  |  |  |  |  |  |
| Prepare/ | 'Submit in  | <u>ePR</u>  |  |  |  |  |  |
|          |   | e the payment type (Scholarship/Fellowship/Traineeship) and vendor information. Use the new vendor process  |  |  |  |  |  |
|          |   | se ***New Vendor*** in <u>ePR</u> if the payee has not been added as a vendor before.   |  |  |  |  |  |
|          | Use the <i>Invoice Date</i> to indicate the date the initial payment should process. Use the <i>Accounting Date</i> to indicate the |   |  |  |  |  |  |
|          | date that the initial payment expense should hit the chartfields. Typically these dates are the same.                               |   |  |  |  |  |  |
|          |   | e whether this payee is a non-resident alien and if so, the country of residence.   |  |  |  |  |  |
|          |   | t under Business Purpose Scholarship/Fellowship/Traineeship   |  |  |  |  |  |
|          |   | lect any required payment options and provide a justification for deviating from the default payment options.   |  |  |  |  |  |
|          |   | the Line Data section add a line for the initial payment only.  |  |  |  |  |  |
|          |   | Add the chartfields for the initial payment.  |  |  |  |  |  |
|          | -   | additional approvals that may be desired or required.   |  |  |  |  |  |
|          | C la .aa : 4 . 4  | he request.   |  |  |  |  |  |

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## Section II: Scholarship/Fellowship/Traineeship Instructions

#### Introduction:

The Scholarship/Fellowship/Traineeship Payment Request Form is used for payments to further the personal education and scholarship of an individual. *No past, present, or future services* can ever be expected in exchange for receiving a scholarship, fellowship or traineeship payment. Amounts received for teaching, research, or other services to the University are compensation and *must* be paid through Payroll. Conversely, since a Scholarship/Fellowship/Traineeship cannot pay for services, Scholarship/Fellowship/Traineeship payments *cannot* be paid through Payroll. For an existing Scholarship/Fellowship/Traineeship, should conditions change and services to the University become expected, all Scholarship/Fellowship/Traineeship payments should be cancelled and the department should pay the recipient for services rendered through the University payroll system.

Note that NIH Kirschstein-NRSA awards allow up to 25% employment in part time research, teaching, or clinical employment when it enhances the education of the trainee, but this must be separate from the traineeship payment and agreement.

## What is a traineeship?

A traineeship is an amount paid by a grant to an individual to aid in the pursuit of study or research. A traineeship recipient may be:

- An undergraduate student, graduate student, post-graduate fellow
- A participant who is participating in a training/educational conference or event

#### **Traineeship Restrictions:**

- All traineeship payments on contracts and grants must be authorized by the awarding agency.
- ANY UNIVERSITY EMPLOYEE (STUDENT OR NON-STUDENT) WHO WORKS ON, AND IS COMPENSATED BY A SPONSORED AWARD, CANNOT ALSO BE PAID AS A TRAINEE/PARTICIPANT ON THAT SAME SPONSORED AWARD. That person must either be classified as an employee or as a trainee/participant; they cannot be both.
- Payments to trainees and participants should only use account codes:
  - 62300-62304: Participant Support Stipends
  - 66900: Scholarships/Fellowships

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- Use of Account Codes 62300-62304 (Participant Support –Stipend) should only be used when Participant
   Support Costs have specifically been awarded as a budget line item and there is a companion project for
   Participant Support Costs set up. Account Code 66900 should be used if there is no budget line for Participant
   Support Costs. Participant Support Costs will typically be associated with NSF awards, but this expense type
   may occasionally be used by other Federal Government Agencies.
- Amounts paid as traineeships are not loans and no past, present, or future services are expected or required as a
  condition of the recipient receiving such payments. If these conditions change, the traineeship should be
  cancelled immediately and the department should take appropriate steps to pay the recipient for services
  rendered through the University payroll system. Since a traineeship is not pay for services rendered, the
  traineeship payment CANNOT be paid through payroll.

## What is a scholarship or fellowship?

IRS Definition of a Scholarship (Topic Number 421):

A scholarship is generally an amount paid or allowed to a student at an education institution for the purpose of study. **IRS Definition of a Fellowship** (*Topic Number 421*):

A fellowship grant is generally an amount paid or allowed to an individual for the purpose of study or research.

#### **Scholarship/Fellowship Restrictions:**

The majority of scholarships/fellowships at the University of Utah are processed and dispersed through the Scholarship Administration System. The Accounts Payable (AP) <u>Scholarship/Fellowship/Traineeship Payment Request Form</u> is *only to be used for the limited situations where payments cannot be processed through the Scholarship Administration system*. These situations include but are not limited to:

- Payments are for non-matriculated or currently non-enrolled students.
- •Scholarship/Fellowship monies exist where the award stipulates the monies cannot be applied to current charges on the student's bill in Income Accounting.
- •Scholarship/Fellowship stipends that require three or more consecutive monthly payments.
- •Scholarship/Fellowship payments for Post-Doctoral Fellows.
- •Scholarship/Fellowship payments for non-University of Utah students. *Note: Departments paying for tuition at other institutions should pay directly to the institutions distributing funds through their Financial Aid systems. See the Student & Educational Payments payment type in ePR.*
- •Emergency Scholarships to aid a student in a personal crisis.

All Scholarship/Fellowship/Traineeship requests submitted via ePR are reviewed for compliance by the University Scholarship Office.

See the Educational Payments Decision Document for more detail.

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## Scholarship/Fellowship/Traineeship payments and their taxability:

Scholarship, Fellowship and Traineeship payments may be taxable income to the recipient. It is the recipient's responsibility to track and document the amounts received and determine whether those amounts are taxable. *Departments should inform recipients that are US residents that no tax reporting i.e. 1099 MISC, W-2, etc. will be generated/provided. Departments should inform recipients that* are not US residents that payments may be reduced by the tax amount paid in accordance with tax treaties with the recipients country of residence. Recipients are encouraged to contact a tax consultant or accountant for tax advice.

## Completing the Scholarship/Fellowship/Traineeship Form

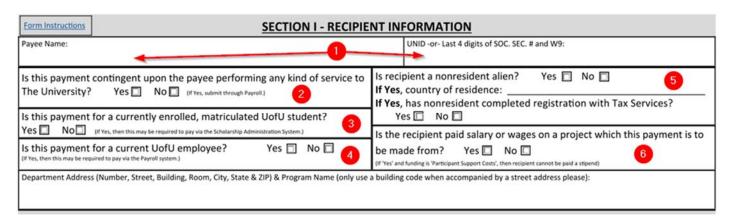
Why do I have to fill out a paper form to submit an electronic request in ePR?

ePR is a powerful system but it does not provide the facility to:

- Make multiple payments from a single request.
- Collect details specific to scholarship, fellowship and traineeship payment requests.
- Collect signatures for the specific attestation required on a scholarship, fellowship and traineeship payment request.

The <u>Scholarship/Fellowship/Traineeship Payment Request Form</u> collects this additional information along with the signature attesting to the nature of the payment. It also spells out the payment schedule and chartfields for recurring payments so that Accounts Payable can schedule the releases required to generate automated payments.

#### <u>Section I – Recipient Information</u>



Please complete all items to facilitate the timely processing of the request.

1. If the recipient is a University student or employee, then enter their UNID; if the recipient is not associated with the University, then enter the last 4 digits of their Social Security Number and have the recipient complete a W-9 form (https://www.irs.gov/pub/irs-pdf/fw9.pdf) to be submitted as an attachment with this request.

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- 2. If the recipient is receiving this payment in exchange for services then the payments should instead be processed through Payroll, not through ePR.
- 3. If the recipient is a currently enrolled, matriculated UofU student then the payment may be required via the Scholarship Administration System.
- 4. If the recipient is currently an employee of the UofU there are circumstances that will require the payment be processed by Payroll.
- 5. Non-resident aliens are required to complete registration with the Tax Services Office. Payment cannot be made until this registration is completed. To make an appointment, verify information, or receive instructions on how to register, call Tax Services at 581-5414.
- 6. In the event a 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 traineeship amount will be withheld and remitted to the Internal Revenue Service.
- 7. If the recipient of this payment is also paid a salary or wages from the same project then this request may be in violation of the rules that govern the grant and should be cancelled.

#### <u>Section II – Payment Explanation</u>

Please provide a brief explanation describing purpose for the payment. <u>The explanation should convey why this payment is justified under this payment type but it should not be more than one or two sentences long.</u> This will help AP to quickly determine if the payment can be made using this form.

#### **Examples:**

- This payment is for a specific scholarship for a matriculated student who is not currently enrolled for the summer semester.
- This payment is for participation in a Research Experience for Undergraduate Research (REU).
- This payment is for a fellowship funded by a specific donation that is to be paid across four months.
- A training conference is being held on (DATE) and this single payment is to pay a stipend for the recipient's attendance.

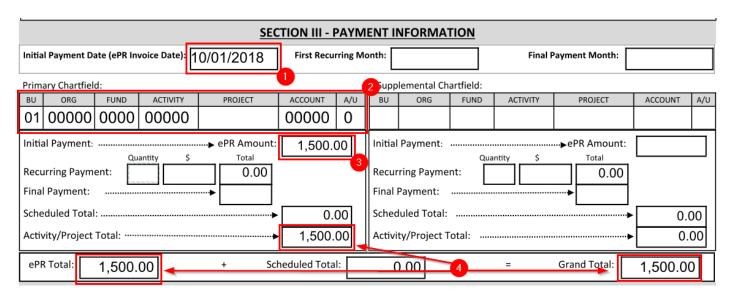
#### **Section III – Payment Information**

All information in this section is important to avoid problems or delays with the payment. This information will affect the total amount paid to the traineeship recipient as well as the number of payments received. What follows is a review of the various payment types and examples of each. If payments are coming from two different chartfields – complete both Section II payment boxes.

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#### **Single Payments**



- 1. Enter the desired payment processing date for this single initial payment. IMPORTANT: Also use this date for the *Invoice Date* in <u>ePR</u>. The payment will process on the date specified in the *Invoice Date* field.
- 2. Enter the Chartfield(s) that the payment will be made from;
- 3. Enter the initial payment amount in the <u>ePR</u> Amount field.
- 4. The subtotals and totals will calculate and update automatically.

Note that payment timing can be affected by weekends and holidays, especially at month-end. The invoice date, as indicated in ePR, will dictate payment timing in most circumstances however precise payment timing is not guaranteed. Payments will process on the first *business day* of the month when the invoice date falls on a weekend and/or holiday. In circumstances where the timing is absolutely critical, take personal control of delivery. Use the invoice date to release the payment early and configure the payment for Hold for Pickup. Pick up the check and deliver as appropriate. Always allow enough time for the complete review and approval process.

#### **Multiple Recurring Monthly Payments**

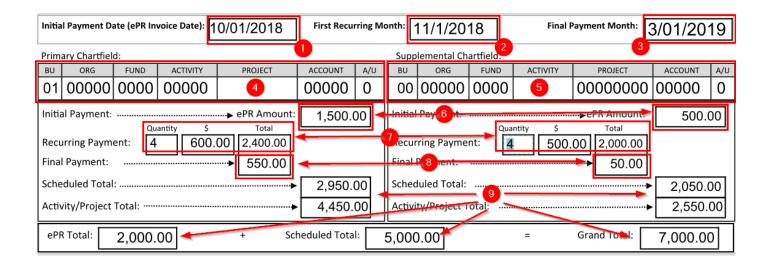
<u>Multiple payments to be made to a recipient must total to three (3) or more payments.</u> If only two payments are required, either submit two separate payment requests or consider combining the two payments into one. Also see 'Periodic Payments Other Than Monthly' below.

For multiple monthly payments, all payments can be the same, or the initial and last payment amounts can be different from the other payment amounts.

Note that scheduled payment timing can be affected by weekends and holidays, especially at month-end. The release date, as scheduled in PeopleSoft, will dictate payment timing in most circumstances however precise payment timing is not guaranteed. Recurring scheduled payments will process on the first *business day* of each month when the first falls on a weekend and/or holiday.

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- 1. Enter the desired payment processing date for the initial payment. IMPORTANT: Also use this date for the *Invoice Date* in <u>ePR</u>. The initial payment will process on the date specified in the *Invoice Date* field.
- 2. Enter the date for the first recurring payment.
- 3. Enter the date for the final payment.
- 4. Fill in the chartfield information for the primary chartfield.
- 5. Fill in the secondary chartfield information if there is a secondary chartfield.
- 6. Enter the amount to be paid from each chartfield on the initial payment. This should match the chartfields and amounts on the request in ePR.
- 7. Enter the quantity i.e. number of months, recurring dollar amount and the total dollar amount to be scheduled against each chartfield.
- 8. Enter the final payment amount to be scheduled against each chartfield. This can be the same as the recurring amount or it can be the remainder left on the grant or contract.
- 9. The subtotals and totals will calculate and update automatically.

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#### This is another way of looking at this payment schedule.

| Payment                 | Initial<br>Payment | 1st<br>Recurring<br>Payment | 2nd<br>Recurring<br>Payment | 4th<br>Recurring<br>Payment | 4th<br>Recurring<br>Payment | Final<br>Payment | Summa                         | ry      |
|-------------------------|--------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|------------------|-------------------------------|---------|
| Month                   | October            | November                    | December                    | January                     | February                    | March            | Total<br>Released by<br>ePR   |         |
| System                  | ePR                | PeopleSoft                  | PeopleSoft                  | PeopleSoft                  | PeopleSoft                  | PeopleSoft       | Recurring<br>Payment<br>Total |         |
| Payment Process<br>Date |                    | 1st of<br>Month             | 1st of<br>Month             | 1st of<br>Month             | 1st of<br>Month             | 1st of<br>Month  | Final<br>Payment:             | \$600   |
| Example<br>Payments     | S2.000             | \$1,100                     | \$1,100                     | \$1,100                     | \$1,100                     | \$600            | Grand Total                   | \$7,000 |

#### **Periodic Payments Other than Monthly**

Multiple scheduled recurring payments can only be set up to be paid monthly with releases on the first of the month. Any payment schedules other than "first of each month" must be submitted manually as separate <a href="epr">ePR</a> requests by the department.

#### **Section IV - Attestation**

Required signatures on this form are as follows:

- Account Executive, Principle Investigator, GFA Approved Alternate or Organizational Head

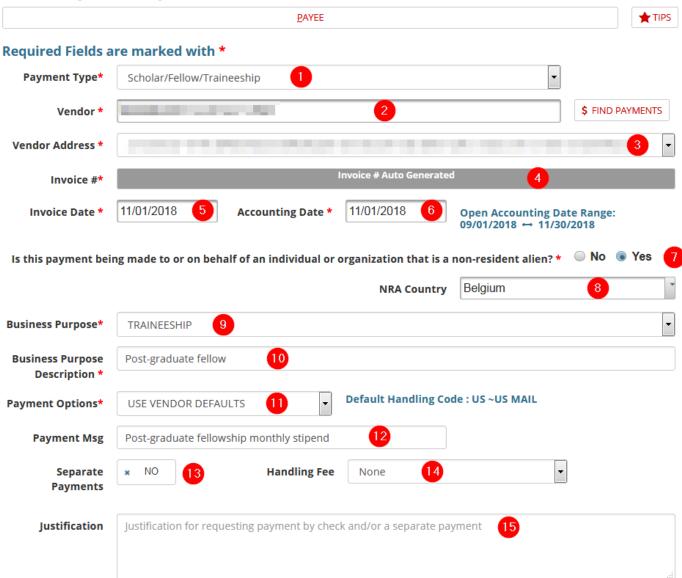
This signature certifies that this is an educational payment as defined by the granting agency and/or IRS and that no services to the University, past, present, or future are required from the recipient.

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## Scholarship/Fellowship/Traineeship Payment Requests in ePR

### **Create Payment Request**



- 1. Select the payment type, Scholarship/Fellowship/Traineeship.
- 2. Select the recipient of the payment as the vendor. Use \*\*\*New Vendor\*\*\* if the payee is not an established vendor.
- 3. Select the correct vendor address. If multiple payments are scheduled, the department campus address should be selected and .
- 4. The invoice number is auto-generated for this payment type.
- 5. Use the invoice date to indicate the desired processing date for the initial payment.

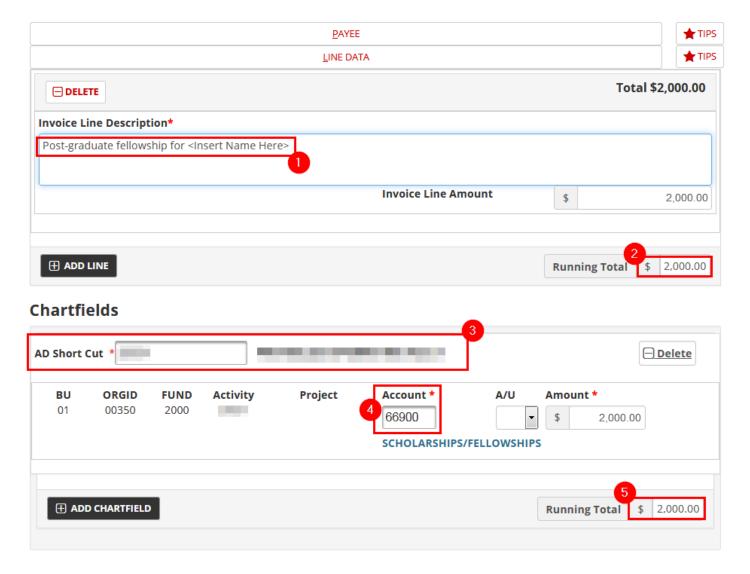
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- 6. Use the accounting date to indicate when the payment should post against the department chartfield(s). The invoice date and accounting date should be the same unless the invoice date is in the past. The invoice date can be set into the future to "schedule" the initial payment. The invoice date is limited to the currently open accounting periods i.e. the current period plus two months. The accounting date must be the current date or later.
- 7. Indicate whether the payment is for a non-resident alien i.e. not a US resident but still earning this payment from within the US.
- 8. Indicate the country of residence for the payee.
- 9. Select the business purpose Scholarship/Fellowship/Traineeship.
- 10. Provide a brief explanation describing purpose for the payment. <u>The explanation should convey why this payment is justified under this payment type but it should not be more than one or two sentences long.</u> This should help AP to quickly determine if the payment can be made using this form.
- 11. Select the payment method for the recipient. This should most likely be left as "USE VENDOR DEFAULTS".
- 12. If a message is required on the memo field of the check, enter the message here. Note that this option will translate only to the initial payment which is processed through <u>ePR</u>.
- 13. Indicate whether this payment should be kept separate from other payments to this vendor. PeopleSoft will always attempt to save effort for both the University and the payee by combining payments onto a single "check". Note that this option will translate only to the initial payment which is processed through ePR.
- 14. Select a handling fee to indicate that the request should be expedited. Note that because of the additional steps required to schedule payments, requests to expedite recurring payments will result in the request moving ahead of all other standard requests but an expedited request could still take several days (instead of 10) to complete. Contact AP directly to discuss current timelines for expedited Scholarship/Fellowship/Traineeship payment requests.

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- 1. Enter a line description.
- 2. Enter the amount. This amount represents the amount of the initial payment only. <u>ePR</u> will process only the initial payment while all subsequent payments will be scheduled.
- 3. Add a chartfield(s).
- 4. Indicate the account.
- 5. Add additional chartfields for this initial payment and ensure that the total for the chartfields equals the total for the lines.
- 6. Add any additional desired or required approvers and submit the request.

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#### **Processing and Payment**

Completed Scholarship/Fellowship/Traineeship forms will be processed when submitted through ePR using the "Scholarship / Fellowship / Traineeship" Payment Type. The initial payment will be released on the invoice date or as soon as the request completes workflow, whichever is later. Subsequent scheduled requests will process on the first of each month as indicated by the schedule on the form. Note that weekends and holidays occasionally affect the actual payment processing date. The payment processing date is the date that a check will be printed or the day that a direct deposit file will be sent to the bank. Always allow 1-5 business days for funds to be available.

Requests must be submitted against open accounting periods. Accounting periods are opened for the current period plus two more. ePR will indicate the open accounting period date range in the space just right of the invoice and accounting dates. If the initial payment is meant for a future accounting period that is not yet open, wait to submit the request until that accounting period is open.



Except when paying a non-resident alien, recurring payments are required to be made via direct deposit. Be sure to submit a new Recurring Direct Deposit Authorization Form with each round of recurring payments. Direct Deposit is not required for single payments.

Scheduled recurring payments are created using a complex and time consuming PeopleSoft process involving up to 5 people in 5 separate steps. Accounts Payable reserves 10 business days for this process. Requests must be submitted and approved 10 or more business days prior to the desired payment processing date. Plan accordingly.

## **Processing Timelines & Expedited Requests**

Single payment Scholarship/Fellowship/Traineeship requests follow a timeline similar to most other requests in <u>ePR</u>. Accounts Payable reserves up to ten business days for processing but most are completed in three to five business days. This timeline starts the moment requests arrive in the AP FINAL REVIEW worklist.

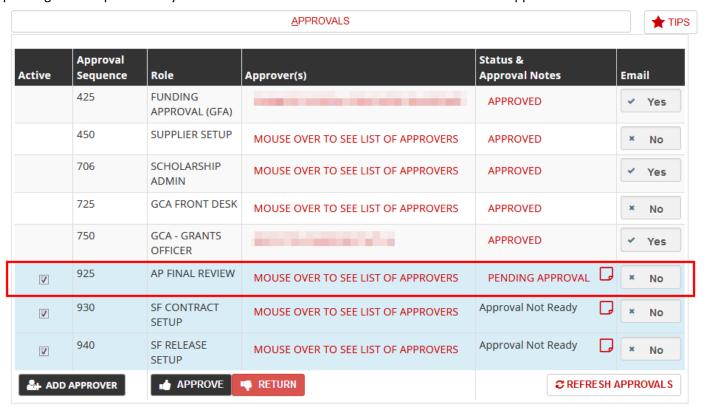
Scheduled recurring Scholarship/Fellowship/Traineeship requests are far more time consuming, however. Because of accounting procedure requirements, these requests are handled by multiple people and the full ten business days are typically required, especially during seasons when large numbers of Scholarship/Fellowship/Traineeship requests are all submitted at once. Because of this, Accounts Payable requires that requests are submitted by the fifteenth of the month. This ensures payment processing by the first of the next month. Requests that arrive after the fifteenth will require a NextDay expedite fee to ensure they are processed before the first. Because Accounts Payable is working to complete all requests submitted prior to the deadline, a blackout period is required for the final week (five business days) of the month. This means that requests submitted in the final days of the month will receive no guarantee that they will be ready for payment by the first. If Accounts Payable completes all pending requests before the end of the month, every effort will be made to process late arrivals ahead of the deadline.

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Note that deadlines are based on the date that a complete, accurate and compliant request arrives in the AP FINAL REVIEW worklist. Departments are responsible for submitting complete, accurate and compliant requests early enough to obtain all other approvals ahead of the fifteenth deadline. Requests that are not complete, accurate and compliant by the fifteenth will be considered late and will require an expedite fee. Requests that are not complete, accurate and compliant by the blackout dates will be placed at the top of the queue for processing in the *following* month. The initial payments will not likely process by the first.

This approval list below is an example where all prior approvals have been completed and the AP FINAL REVIEW is pending. The request history will show the date and time of submission and of each approval.



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## Changing or Cancelling Scheduled Scholarship/Fellowship/Traineeship Payments

#### Adding an Additional Amount to an Existing Payment Schedule

To add any amount to an existing recurring payment schedule, just add another request for a recurring payment i.e. repeat the submission of the Scholarship/Fellowship/Traineeship form and ePR request. For example, adding another \$50 per month to an existing schedule simply requires a new form and request with an initial payment through ePR for \$50, a recurring monthly payment for \$50 and a final payment of \$50. This is more efficient than deleting the original request and starting over. It also eliminates the chance of double payment. The recipient will still receive a single check or electronic payment per month unless the preparer selects *Separate Payment* in ePR and even this will only affect the initial payment.

#### Reducing a Recurring Payment Amount or Shortening an Existing Payment Schedule

When a change can't be accomplished by adding to an existing request, this protocol should be used. It involves cancelling an existing schedule and creating the new schedule. To reduce the chance of adding the new schedule without eliminating the old, submit the cancellation form *on top of the new Scholarship/Fellowship/Traineeship form*. Simply scan them together (cancellation on top) and attach them both to a new request in <u>ePR</u>. Use the <u>Stop Monthly Scheduled Educational Payments Form</u> for this purpose. The new request will replace the old request completely and should contain the full amount required to be paid initially through <u>ePR</u> and subsequently as scheduled payments.

It is critical that the Stop Monthly Scheduled Educational Payments Form appears in a single PDF and in front of the new Scholarship/Fellowship/Traineeship Payment Request Form when attached to the new request in <a href="epr">ePR</a>. This cancellation must be obvious or the result could be a duplicate payment. It's also critical that the preparer and the management reports reviewer, upon completion of workflow for this request in <a href="epr">ePR</a>, review the encumbrance reports to ensure the cancellation of the initial contract and creation of the subsequent new contract were communicated and executed as intended.

#### **Canceling an Existing Payment Schedule**

When simply cancelling a recurring payment schedule, email a completed <a href="Stop Monthly Scheduled Educational">Stop Monthly Scheduled Educational</a>
<a href="Payments Form">Payments Form</a>
to ap@admin.utah.edu. For now, email is the preferred delivery method. A new procedure is in development that will make this process more traceable and provide notifications when critical steps are completed.

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## **Stop Monthly Scheduled Educational Payments Form**

| Send To: ap@admin.utah.edu -or-  | Date:             |                                       |  |  |  |  |  |  |
|--|-------------------|---------------------------------------|--|--|--|--|--|--|
| Accounts Payable Park/145 (201 S Presidents Cir Rm 145) Tele (801) 581-6976 FAX (801) 585-6443 |                   |                                       |  |  |  |  |  |  |
| Preparer's Information:  |                   |                                       |  |  |  |  |  |  |
| Preparer's Name:   |                   |                                       |  |  |  |  |  |  |
| Preparer's Phone:  | Preparer's Email: |                                       |  |  |  |  |  |  |
| Payment Information:   |                   |                                       |  |  |  |  |  |  |
| Student/Recipient's Name:  |                   | Student UNID (if no UNID, enter SSN): |  |  |  |  |  |  |
| Scholarship/Fellowship Name—or—Traineeship Name:   |                   |                                       |  |  |  |  |  |  |

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