

## **Instructions for Completing the Nonresident Alien Scholarship or Fellowship Voucher State and UBF**

### Part I: Background Information

According to Federal Regulations nonresident aliens who receive scholarships/fellowships must be taxed on any portion of the scholarship/fellowship that is not used to cover qualified expenses. Qualified expenses include tuition, comprehensive fees, student activity fees, and direct billed course and program fees. Required books, equipment, and supplies are qualified expenses for student-athletes, EMBA, PMBA and dental school students.

Note: If a payment is an award as defined by the Internal Revenue Service as "amounts received primarily in recognition of religious, charitable, scientific, educational, artistic, literary or civic achievement, or received as the result of entering a contest," then you should not use this form.

- The non-qualified portion of the scholarship/fellowship must be taxed at 14% unless there is an applicable tax treaty exemption.
- Tax treaty eligibility will be determined when the Scholarship Voucher and Request for Information are received by the respective payroll office, then the student will be contacted
- If you are receiving a scholarship that is covering non-qualified expenses and you are eligible for a tax treaty exemption, you must have a Social Security Number (SSN) or an Individual Taxpayer Identification Number (ITIN) to take advantage of the tax treaty. If you are not eligible for a SSN, call the IRS at 1-844-545-5640 to make an appointment to apply for an ITIN.

### Part II: Procedure

- A. These forms must be used for all nonresident alien scholarship/fellowship recipients that are receiving their scholarship/fellowship through the State or UB Foundation
- B. The Voucher and Request for Information must be completed for the scholarship/fellowship to be processed
- C. All scholarship requests will be sent directly to the Office of Financial Aid  
The qualified portion of the scholarship will be applied to the student's account  
The non-qualified portion of the scholarship will be sent to the State payroll or UB Foundation payroll to be taxed. UB Foundation requests will be directed back to the Office of Student Accounts to be applied to the student's account. State requests will be issued by check and mailed directly to the student's home address.

### Part III: Completing the Scholarship/Fellowship Voucher and Request for Information

- A. The student should complete Part I and Part II only on the Voucher. The department will complete the other parts. Your signature in Part II, must be hand or electronically signed.
- B. The student should complete all of the "Request for Information for Scholarship/Fellowship Recipient" Your signature must be hand or electronically signed.
- C. Give your department a copy of your I-94 and I-20 or DS-2019
- D. Send to your department so that they can complete their parts of the Voucher

If request is for State funded fellowships (Dean's, Presidential etc) send completed forms to:

Carlos Gallardo  
Human Resources  
Townsend Hall, South Campus

If request is for UBF funded Scholarships/Fellowships or State funded scholarships, send completed forms to:

Office of Financial Aid  
1 Capen  
North Campus

**NRA SCHOLARSHIP/FELLOWSHIP  
VOUCHER STATE AND UBF FUNDED**

Student should complete PART 1 and PART II only. The department will complete the other sections.

**PART I**

Student Name:

Local Street Address:

City, State, Zipcode:

Social Security Number/ITIN (if applicable)

Date of Birth

UB Person #

**PART II**

Student Certification

I certify that the information provided is true and accurate, and that I am subject to penalty of perjury if false.

Student Signature

Date

**PART III**

Department

Prepared By:

Campus Address and Phone

Email Address

**PART IV**

Amount of Scholarship Awarded -List each scholarship separately

Name of Scholarship Fellowship	Amount	Semester/YR	Account No.	Funding Source
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Total Funded by State

Total Funded by UBF

**PART V**

Departmental Authorization

I certify that the payment requested above is true and accurate and that the charges are authorized against the account shown.

Authorized Signature

Date

**FOR OFFICE USE ONLY**

State

UBF

Total Qualified Scholarship/Fellowship (Tuition and Fees)

Total Nonqualified Scholarship/Fellowship

Date Completed

Forwarded To:

# Request for Information for Scholarship/Fellowship Recipient

## THIS FORM MUST BE COMPLETED BY THE STUDENT

To ensure correct determination of your tax status, all applicable questions below must be answered and a copy of the following forms must be attached:

\* I-94 Form "Arrival and Departure Record"

\* I-20 or DS-2019

Last (Family) Name

First Name

US Social Security Number/ITIN

If you do not have a Social Security Number, you MUST apply for an Individual Taxpayer Identification Number. Please make an appointment with the IRS at 1-844-545-5640 to apply.

UB Person Number (8 digit number from your UB Card)

Are you a lawful permanent resident of the U.S. (hold an Alien Registration Receipt Form I-551)? YES NO

\*If 'YES' do not finish completing this form. Your scholarship payment should not be made using the attached voucher.

Email Address

**US Address**

**Foreign Residence Address (where you were living before coming to the US)**

Street

Line 1

City/State

Line 2

Zipcode

Line 3

City

Providence/Region

Postal Code

Country

Country of Citizenship

Country that issued your passport

Passport #

Current Visa Type

If J-1 or J-2, what is the subtype as indicated on the DS-2019

Date you first entered the US

Please list all visits to the US in any visa status (i.e. B1/B2, F1, F2, J1, J2, H1B, O1, TN)

Date of Entry

Date of Exit

Visa Type

Purpose of visit

Student Certification

I certify that the information provided above is true and that I am subject to penalties for perjury if false.

Signature

Date