



DATA COLLECTION FORM – SCHOLARSHIP/FELLOWSHIP

The IRS defines scholarship as an amount paid or allowed to, or for the benefit of a student at an educational institution or a research to aid in the pursuit of independent educational activity, study, or research. A fellowship is generally an amount paid for the benefit of an individual to aid in the pursuit of graduate study or research. See IRS publication 970 (Tax Benefits for Education) for more information.

Please complete and forward this document along with all corresponding documentation (payment request, recipient award letter, payment schedule, etc.) and forward it to the Payment and Procurables team at the Research Foundation of CUNY.

1. Recipient's Name (if multiple recipients, check this box and, if applicable to all recipients, answer questions 4-7 and complete the attachment spreadsheet, otherwise fill out a separate form for each recipient).

First Name _____ Last Name _____ M.I. ____ Email _____

2. Is the recipient a US Citizen /US Non-citizen National or permanent resident? Yes No (if the recipient in not a US Citizen /US Non-citizen National or permanent resident, RF form 702 must be completed by the recipient and submitted with this form. Failure to answer the question accurately may create a tax liability owed by the payee and/or college where the payee is a Non Resident Alien for tax purposes (NRA).

3. Recipient's Address: Street _____ City: _____ State: _____ Zip: _____

4. Recipient's EFT/ACH information: ABA Routing # _____ Account# _____ Checking Savings

5. Recipient's Social Security (SSN) or Individual Taxpayer ID (ITIN) No. (Not CUNY student #) _____

6. Total Dollar Amount of Award \$ _____

7. Is the recipient enrolled in a degree program? Yes No

8 Type of Program: Undergraduate Graduate Masters Ph.D Post Doc. Other _____

9. Is teaching or any form of services required as a condition for receiving a scholarship / fellowship? Yes No

10. If required, does research, teaching, or other services benefit the grantor? Yes No

If the answer to questions 9 or 10 is Yes, then the full payment or the service-related portion of the payment is considered compensation and not a non-service scholarship or fellowship. Review RFCUNY's compensation guidelines on how to process service payments.

11. Is the recipient also being supported by a federal or federal pass-through award? Yes No

If yes, provide RF account # _____

Period of Support From _____ to _____ Amount \$ _____

Notes _____

The Project Director or Principal Investigator, by signing below, represents that to the best of his/her knowledge that the above representations are true and also acknowledges that the Research Foundation providing these funds to the individual(s) requested based on the Project Director's above representations and any liabilities arising out of any misstatement may be the responsibility of school.

Project Director / Principal Investigator Signature

Date