

# SCHOLARSHIP AND FELLOWSHIP PAYMENTS— SS1 DOCUMENTS

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## I. INTRODUCTION

SS1 documents are used to process departmental scholarship/fellowship payments. An encumbrance of funds occurs upon final approval of the document. SS1 documents automatically verify the registration status of the recipient before each payment. A non-enrolled recipient or unregistered student requires extra authorization from Scholarship and Fellowship Services in the Office of Accounting. All scholarship payments will be made using direct deposit as the default payment method. Bars (money owed) will be deducted automatically from SS1 payments before the balance is paid to the recipient. Departments may restrict scholarship payments to process only when a student is enrolled full-time and payments will automatically be held when the student falls below the established full-time enrollment requirements.

 [Scholarship and Fellowship Services](#)

## II. COVER SHEET: SS1 CREATION

```

>> Select a document or a new action and press enter to continue <<
*DEFINE          SCHOLARSHIP/FELLOWSHIP AWARD DOCUMENT - SS1          Year 05 06
Command: SS1          Misc: 3          Account: _____
=====
Status:          -- COVER SHEET --          Document ID: _____
Action: NEW Summary: ETHEREDGE, L. - NATIONAL MERIT
Created: / /

Sections:
- 1. Compliance Questions
- 2. Student and Account Information
- 3. Address Selection/Check Routing
- 4. Payment Schedule
- 5. Award Comments (Optional)
- 6. Department Codes (Optional)          Route to Scholarship _
-----
Account Nbr.: - -          EID:
Award Title :          Name:
Award Amount:          School:          Major:          Class:
Award Status:
Next Payment:          YYS: 000 Hours:          Student:
          US Citizen:
SFS Status: SFS Counselor: Fee Bill Status:

-- 0 UT Austin ----- PF1=Options ----- PF8=Exit ----- 9/15/05 12:01 PM --

```

**Figure 1: SS1 Cover Sheet**

The SS1 cover sheet summarizes all information found in the various sections of the document.

1. Create a new SS1 document by typing **NEW** in the **Action** field. Press **Enter** to continue.
2. \*DEFINE will prompt the user to enter the document **Summary**. Type a descriptive summary in the **Summary** field – such as the recipient’s name and the title of the scholarship. Press **Enter** to update the cover sheet.

3. \*DEFINE will automatically assign a document ID number, update the document status to **Created**, and display the creator's logon ID and the document creation date.
4. Type an **X** in the fields for each Section of the document to be updated. Sections 1 through 4 are required. Sections 5 and 6, Award Comments and Departmental Codes, are optional.
5. If you enter **X** for all the sections you wish to update, \*DEFINE will automatically advance to the next section marked when you press **Enter** after successfully updating the current section.

### III. SECTION 1: COMPLIANCE QUESTIONS

1. **Compliance Question 1** must be answered before the other questions will be displayed:

```
+-----+
| >> Press ENTER to continue. <<                                     |
| Action: Compliance Questions                                         Section 1 of 5             |
| Document ID: ROSS1999888 - 2005 SPRING SCHOLARSHIP CHECKS          |
|-----+-----+
| 1. During the period of this award, will the recipient be appointed as a |
| (choose all that apply):  _ TA      _ AI      _ RA      X none      |
+-----+-----+
```

**Figure 2: Compliance Question 1**

Type an **X** in the field next to the abbreviation that indicates the type of appointment the scholarship recipient will have. The choices are:

- **TA**—Teaching Assistant
- **AI**—Assistant Instructor
- **RA**—Resident Assistant
- **None**—No appointment

Press **Enter**. \*DEFINE will generate the remaining compliance questions.

```

>> Press ENTER to continue. <<
Action: _____ Compliance Questions Section 1 of 5
Document ID: ROSS1999888 - 2005 SPRING SCHOLARSHIP CHECKS
-----
1. During the period of this award, will the recipient be appointed as a
   (choose all that apply):  _ TA      _ AI      _ RA      X none

2. Must the recipient perform any of the following services in exchange
   for this award (Y or N)? N
   *Research      *Teaching      *Grading
   *Web Development *Facilitating/Organizing an event *ANY OTHER SERVICE

3. Is this a reimbursement for official university business (Y or N)? N
4. Is this award for travel (Y or N)? N
   If Yes, is the recipient required to be a registered student? (Y or N) N
   Travel code for Destination: _____
   and Purpose: _____

5. If the recipient is a student, does the student have to be
   registered full time (Y or N)? Y

6. This award is based on (choose at least one):
   _ Financial need  _ Academic merit  X Other ATHLETICS _____

```

**Figure 3: Compliance Questions**

2. **Compliance Question 2** (see Figure 3): If the scholarship recipient is **not** required to perform any services such as research, teaching, grading, web development, or event organization in exchange for the award, enter **N**.



**Note:** If services as described above are required, an SS1 document is not appropriate for processing the payment. If you enter **Y**, an error message will indicate that you should use an OV7 Payroll document rather than an SS1.

3. **Compliance Question 3** (see Figure 3) determines whether the scholarship or fellowship is taxable: If the award is **not** a reimbursement for official University business, enter **N**.



**Note:** If the award is a reimbursement, an SS1 document is not appropriate for processing the payment. If you enter **Y**, an error message will indicate that you should use a VP2 document rather than an SS1.

4. **Compliance Question 4** (see Figure 3) determines if the award should be used by the Office of Student Financial Services to calculate the student's financial aid funding: If the award is for travel, enter **Y**. If not, enter **N**.

Although travel awards are taxable to the recipient (as any scholarship or fellowship payment is) travel payments do not reduce the amount of financial aid available to the student.

If question 4 is answered **No**, skip to question 5. If the answer is **Yes**, you must

indicate whether the recipient must be a registered student in order to receive the award. Enter **Y** or **N**. You must also enter a Destination and Purpose code for the travel. Enter a **?** in the field to view a list of Destination or Purpose codes.

5. **Compliance Question 5** (see Figure 3) allows the creator to require full-time enrollment of the recipient: If full-time enrollment is required, enter **Y**. If not, enter **N**.

If you enter **Y**, \*DEFINE will verify the recipient's current student records to determine if the hours enrolled are considered full-time for the school and academic level of the recipient.

6. **Compliance Question 6** indicates the basis of the award. The choices are:
  - Financial need
  - Academic merit
  - Other

Mark all that apply with an **X**. If **Other** is marked, type a reason in the field provided. If **Other** is marked, the document will route to Scholarship and Fellowship Services for final approval.



**Note:** To avoid unnecessary delays in SS1 processing, please do not mark the **Other** field unless the document needs to be reviewed by Scholarship and Fellowship Services .



[Scholarship and Fellowship Services](#)

7. After you have answered all compliance questions, press **Enter** to update and save the information. \*DEFINE will generate a successful update message at the top of the screen.

Press **Enter** again to advance to Section 2.

## IV. SECTION 2: STUDENT AND ACCOUNT INFORMATION

```

+-----+
| >> Press ENTER to continue. <<                                     |
| Action: _____ Student and Account Information                Section 2 of 5 |
| Document ID: ROSS1999888 - 2005 SPRING SCHOLARSHIP CHECKS         |
|-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+|
| ID: LYNNEEE + _____ Awardee is a UT Employee: N             |
| Name: _____ First Middle Last Suffix                       |
|           Lynne_____ Elaine_____ Etheredge_____           |
|-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+|
| Total Award Amount: 1,279.00 +                                   |
| Award Amount by Semester:                                       |
|           Fall ( _ ) 0.00                                       |
|           Spring ( X ) 1,279.00                                  |
|           Summer ( _ ) 0.00                                       |
| Offer Expiration Date (MMDDYY): 011606                          |
| Account Number: 3062692470 + Related Account: _____       |
| Account Title: Various Donors-Variou Purposes _____         |
| Award Title: Various Donors-Variou Purposes _____           |
|-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+|
| Special Purpose: R _____ Travel N Academic Competitive (Y/N): N |
|-----+-----+-----+-----+-----+-----+-----+-----+-----+-----+|

```

Figure 4: Section 2—Student and Account Information

1. In the **ID** field, type the recipient's **UT EID** and press **Enter**. If the EID is already in the student, employee, or vendor files, the name will be filled in automatically. If the recipient doesn't have a UT EID, enter his or her social security number, and a pop-up window will prompt you to create a UT EID.
2. In the **Total Award Amount** field, enter the full award amount for the academic year.
3. The **Award Amount by Semester** field will fill in automatically after the payment schedule in Section 4 has been completed.
4. In the **Offer Expiration Date** field, enter the date by which the award must be accepted. This field is optional and may be left blank.
5. In the **Account Number** field, enter the account to be used to make the payments. Usually, you will use a 70 subaccount, and it must have the following object codes available: 0300, 1600, 1601, and 1608.
6. The **Account Title** field will fill in automatically when you press **Enter**.
7. The **Award Title** field will fill in automatically when you press **Enter**. Additional lines are available to type any other information required.
8. If the award is for research, enter an **R** in the **Special Purpose** field. Otherwise, leave it blank.

9. The **Travel** field will fill in automatically based on the answers entered for the compliance questions in Section 1.
10. In the **Academic Competitive** field, enter **Y** if the award is the result of a competition. Otherwise, enter **N**.
11. Press **Enter** to proceed to Section 3.

## V. SECTION 3: ADDRESS SELECTION AND CHECK ROUTING

```
>> Press ENTER to continue. <<
Action:  ___ Address Selection/Check Routing Section 3 of 5
-----
VID: 2 LYNNEEE 004 Name: Etheredge, Lynne Elaine
X LOCAL Addr Line 1: 00003 TECH RIDGE BLVD APT 001
          Addr Line 2:
          City/St/Zip: AUSTIN TX 78700
_ PERM Addr Line 1: 0009 WOODWAYE AVE
          Addr Line 2:
          City/St/Zip: HOUSTON TX 00002-1200

          Last Semester Enrolled: 20059

          Check Pick Up: X Check Dist: S
          See vendor addr: Reset addr:
          If none of the addresses are correct, please contact the
          recipient to update their address.
```

**Figure 5: Section 3—Address Selection and Check Routing**

## A. Payments to Recipients Without a Vendor Record

If the award recipient does not currently have a vendor record, a GGS pop-up screen will appear to enable you to create a vendor record:

```

*DEFINE          VENDOR ID REQUEST FOR SCHOLARSHIPS - GGS          Year 05 06
Command: GGS     Account: _____ Misc: _____          Month: OCT
=====
Status: _____ Document ID: _____
  Action: NEW Summary: 051010 DEPT VENDOR ID REQUEST _____
Created: 10/10/05 by ACLEL -
VENDOR INFORMATION
  Vendor ID: _____
  Vendor Primary Name: _____
  Other Name: _____
  Non-Post Office Info: _____
  Postal Address: _____
  City: _____ State: __ Zip: _____
  Phone: _____ Fax: _____ Country Code: __
ENTITY INFORMATION
Ownership Type: _ Texas Charter Nbr: _____
Owner Names: _____
and SSNs _____

```

**Figure 6: GGS Document**

1. Type **NEW** in the **Action** field, and press **Enter**. The GGS document status will change to **CREATED**, a document ID will be assigned and displayed, and the **Summary** will automatically fill in using the creation date, year, and day. Example: 050816 DEPT VENDOR ID REQUEST.
2. Enter the recipient's U.S. postal address, city, state, and zip code. Press **Enter**. A message indicating that the document was created successfully will appear at the top of the screen.

If an address can be modified to a more standard U.S. Postal record, \*DEFINE will generate an information window. Press **Enter** to select the recommended address. Type **X** to submit the address exactly as entered or press **Clear** to delete the GGS.

3. Verify the accuracy of the address, then type **APP** in the **Action** field to approve the GGS document. The GGS must be final approved before you can update Section 3 of the SS1 document.



**Note:** A Non-Student Scholarship/Fellowship Eligibility Verification Form (NSE) must be sent to the Office of Accounting, with proper identification, before the GGS can be approved. The SS1 cannot be approved by the creator until the GGS is approved by Scholarship and Fellowship Services.



[Non-Student Scholarship/Fellowship Eligibility Verification Form \(NSE\)](#)

## B. Payments to Recipients with Existing Vendor Record

1. **\*\* DIRECT DEPOSIT \*\*** will be automatically displayed when account information is found in the electronic funds transfer (EFT) section of **My Bank Info** in UT Direct for the recipient. If no direct deposit information is available, the following selection criteria will be displayed:
  - For students: Local or Permanent address from student records.
  - For employees: U.S. Mail and Campus mail addresses.
  - For non-employees/non-students: Up to three current vendor addresses. You may create a GGS document if a new address is needed.
2. Type an **X** next to the appropriate mailing address.



**Note:** In special circumstances, with high-level approvals and only on an exception basis, it is possible to enter an **X** in the **Check Pick Up** field (see Figure 5) so that the recipient may pick up a check rather than receive it by direct deposit or mail. This procedure is rarely authorized.

If you mark the **Check Pick Up** field, a warning message will be displayed: *“When selecting check pick up, you must submit an approved pick up request letter authorized by the Unit Head, Chair, Director, Dean or higher authority from the account the payment will be made on. You must also type in the Notes section the name and phone number of the person picking up the check.”*

If you have questions about the availability of check pickup for a specific situation, see the [askUS knowledge base](#).

3. Press **Enter** to proceed to Section 4.

## VI. SECTION 4: PAYMENT SCHEDULE

You may schedule payments to the recipient manually, or you can set up a series of automatic payments.

```

>> Please enter your Updates or a Document Action. <<
Action: _____ Payment Schedule Section 4 of 5
Document ID: ROSS1984558 Award Amt: 1,500.00 Unpaid Bal: 1,500.00
-----
To schedule payments, you may:
1. Manually type in the payment schedule below (or)
2. Use the automatic scheduling feature by typing an "X" here: X
-----
St Hd   Payment Amt   Date Date Pd Mail   Address           City   St Zip
1)      _____   _____
2)      _____   _____
3)      _____   _____
4)      _____   _____
5)      _____   _____
6)      _____   _____
7)      _____   _____
8)      _____   _____
9)      _____   _____
10)     _____   _____
11)     _____   _____
12)     _____   _____

```

Figure 7: Section 4—Payment Schedule

### A. Manually Scheduled Payments

```

>> Record was successfully updated <<
Action: _____ Payment Schedule Section 4 of 5
Document ID: ROSS1984558 Award Amt: 1,500.00 Unpaid Bal: 1,500.00
-----
To schedule payments, you may:
1. Manually type in the payment schedule below (or)
2. Use the automatic scheduling feature by typing an "X" here: _
-----
St Hd   Payment Amt   Date Date Pd Mail   Address           City   St Zip
1)      _____   _____
2)      --          750.00 011606
3)      --          750.00 031606
4)      _____   _____
5)      _____   _____
6)      _____   _____
7)      _____   _____
8)      _____   _____
9)      _____   _____
10)     _____   _____
11)     _____   _____
12)     _____   _____

```

Figure 8: Section 4—Payment Schedule

1. In the **Payment Amt** column, enter an amount for each payment to be made to the student. Each payment is entered on a separate line.
2. In the **Date** column, enter the dates on which each payment will be made.
3. After you enter the payment amounts and dates, press **Enter**.



### C. Updating and Tracking Payments

```

>> Press ENTER to continue. <<
Action:          Payment Schedule          Section 4  of 5
Document ID: R0SS1999888  Award Amt:  1,279.00  Unpaid Bal:
-----
To schedule payments, you may:
1.  Manually type in the payment schedule below (or)
2.  Use the automatic scheduling feature by typing an "X" here:
-----
   St Hd   Payment Amt   Date Date Pd Mail   Address          City   St Zip
1)  P  -      142.12  011105  011105  004 3330 SAN JACINTO H AUSTIN TX 78705
2)  P  -      284.22  011905  011905  004 3330 SAN JACINTO H AUSTIN TX 78705
3)  P  -      284.22  022105  022105  004 3330 SAN JACINTO H AUSTIN TX 78705
4)  P  -      284.22  032305  032305  004 3330 SAN JACINTO H AUSTIN TX 78705
5)  P  -      284.22  042505  042505  004 3330 SAN JACINTO H AUSTIN TX 78705

```

**Figure 10: Section 4—Payment Schedule**

1. After payments are scheduled, the **St** and **Hd** fields become available. To place a hold on a payment, type an **H** in the **St** field. Then select a reason for the hold from the field level help by typing **?** in the **Hd** field and pressing **Enter**. To remove a hold, space over the **St** and **Hd** fields.
2. Update dollar amounts or dates manually by typing over the existing dates on the payment schedule.



**Note:** On approved documents, the total award amount must remain the same. To change the total award amount on an approved document, process an SSA document.

3. After a check is printed, the **Date Pd** field will be updated with the date of payment, and the **St** field will display a **P**, indicating that the payment has been made.



## X. FREQUENTLY ASKED QUESTIONS

- 1. Question:** If the recipient is not registered or has not yet completed registration by paying the required deposit, how can I release the scholarship payment?

**Answer:** If recipient is a student but enrollment has not yet been completed, an automated email message (below) will be sent from the Office of Accounting Scholarship and Fellowship Services to the document creator. This alerts the creator the payment will not be released and will also instruct how to override the document if needed.



**Note:** Non-students must complete and submit a Non-Student Scholarship/Fellowship Eligibility Verification Form (NSE) before a payment can be released.



[Non-Student Scholarship/Fellowship Eligibility Verification Form \(NSE\)](#)

### Sample Email:

**Email title:** ROSS1999999 has a registration problem  
You created ROSS1999999 for First Middle Last  
The recipient of these funds has not completed their registration and therefore SS1 payments are being held until registration is complete. If this student does not need to be registered please add Notes, and also have the Accounting Contact or a signer on the account add Notes to the document and reply to this email. If you only add Notes to the document the status will not change. You must also reply to this email for action to be taken. If this student is no longer eligible for these funds please process a SSA to cancel payment.

- 2. Question:** If the answer to Compliance Question 5 is **Yes**, requiring the recipient to be enrolled full-time, can this be changed after approval to allow the payment to be released, even if the student falls below the full-time enrollment requirement?

**Answer:** Yes, by processing an SSA document. An automated email message will be sent from the Office of Accounting Scholarship and Fellowship Services to the document creator to notify that payment will not be released.

### Sample Email:

**Email title:** ROSS1999998 has a full-time enrollment problem  
You created ROSS1999998 for First Middle Last  
The recipient of these funds is not currently enrolled full-time therefore SS1 payments are being held. The SS1 document indicates this student must be registered full-time to receive these funds. If this student does not need to be registered full-time or is no longer eligible for the award please process an SSA. You may process an SSA to cancel the award or change only the answer to Compliance Question #5. Thank you.

- 3. Question:** What will happen if a scholarship recipient has direct deposit (ACH) information in **My Bank Info** in UT Direct at the time the scholarship is approved,

but the recipient deletes this information from his record before the actual payment date?

**Answer:** An automated email message will be sent from the Office of Accounting Scholarship and Fellowship Services to the creator of the document to alert the creator the payment will not be released.

**Sample Email:**

**Email title:** ROSS1999997 has a funds distribution problem

You created ROSS1999997 for First Middle Last

At the time of approval the recipient of these funds was set up for direct deposit (ACH) however; the SS1 recipient no longer has EFT information on file. No payment can be released until a mailing address is identified. Please add Notes to the document identifying if the check should be mailed to the local or permanent address and reply to this email. For employees/postdocs please indicate campus or US mailing address. If you only add Notes to the document the status will not change. You must also reply to this email for action to be taken. Thank you.

- 4. Question:** What happens if a scholarship recipient does not have direct deposit (ACH or EFT) information in **My Bank Info** in UT Direct at the time the scholarship is approved, but the recipient updates this with their bank information before the payment date?

**Answer:** The payment will be sent by direct deposit (ACH) based on the updated information in the EFT section of **My Bank Info** in UT Direct.

- 5. Question:** What happens if a student has one or more bars (owes the University money) on his student account? Will payment be made?

**Answer:** Bars will be deducted before the balance of the award (if any) is paid to the student. The student will receive an automated email message from Scholarship and Fellowship Services to identify the type and amount of bars paid and to alert the recipient the scholarship payment has been reduced by the payment of bars.

**Sample Email:**

**Email title:** Scholarship/fellowship check held at the Cashier's Office

You were scheduled to receive a scholarship/fellowship payment in the amount of \$100.00; however the following bar(s) have been deducted:

Health Services	\$20.00
Housing and Food	\$50.00

Actual payment amount	\$30.00
-----------------------	---------

In addition, the following bar(s), which must be paid in full, have prevented the check from being released to you:

Returned check fee	\$175.00
--------------------	----------

Parking and Transportation      \$55.00

Your check will be sent to the CASHIERS office (MAIN 8) where you can collect your payment when the remaining bar(s) have been paid in full. Thank you.

**6. Question:** How can a non-student update his or her direct deposit information?

**Answer:** A non-student who wishes to set up direct deposit may submit an Electronic Funds Transfer (EFT) Authorization Form.

 [Electronic Funds Transfer \(EFT\) Authorization Form](#)

Return the completed form to the campus address listed. This form must be completed and signed by the recipient; a department cannot complete this form for a recipient.

**7. Question:** How can I process a Scholarship/Fellowship payment to an international student who does not have a SSN?

**Answer:** To address the problems encountered when payments are made without a taxpayer number, the Office of Accounting has provided the following procedures to allow payments to these students. A student without a taxpayer number may fall into one of the following categories:

- **Student is eligible for an SSN.**

Students who are eligible for an SSN should follow the International Office's (IO) instructions to apply for an SSN.

1. The Social Security Administration will either give the student a delay letter or a receipt.
2. If the student obtains an application receipt, no temporary number will be issued and the student's SS1 document must be held until the student has received the SSN and updated his or her student records in the Registrar's Office with an SSN.
3. If a delay letter is given to the student, this letter must be provided to the departmental user who is processing the SS1 scholarship payment document. The department must fax the delay letter to Scholarship and Fellowship Services so that the Office of Accounting can set up a temporary number to process the scholarship payment.

 [Scholarship and Fellowship Services](#)

 [International Office](#)

- **Student is eligible for tax treaty benefits and may apply for an Individual Taxpayer Identification Number (ITIN) when he or she applies for tax treaty benefits.**

For those students who may apply for tax treaty benefits and an ITIN but are ineligible to apply for an SSN because they will not be working on campus, please follow these steps:

1. Make an appointment with the International Office (IO) for a treaty benefit and taxpayer number application.
2. The IO will call the student upon receipt of the ITIN letter from the IRS.
3. The student will bring a copy of the ITIN letter and a copy of the W-8BEN application prepared by the IO to the Office of Accounting (OA).
4. The OA will process a refund of all scholarship taxes previously withheld in that calendar year and will update the student's vendor record to reflect the ITIN issued.
5. If the student is subsequently eligible for work and obtains an SSN, the student's records must be updated with the registrar's office to include the SSN, and the Office of Accounting must be notified to update their records, replacing the ITIN with the SSN.



[Scholarship and Fellowship Services](#)



[International Office](#)

- **Student has no employment authorization, is not eligible for tax treaty benefits, and cannot apply for an ITIN until he or she files a United States income tax return (IRS Form 1040 NR) in the year following receipt of scholarship payments.**

For students who may not apply for an SSN or tax treaty benefits, please follow these steps:

1. The department issuing the scholarship will contact Scholarship and Fellowship Services to add the student's UT student number as their vendor number so the SS1 scholarship document can be processed and the scholarship payment can be made.
2. 14% will be withheld from all scholarship payments paid on this temporary number.
3. The student must apply for an ITIN when he or she files a U.S. income tax return.
4. The International Office will work with students as part of their Volunteer Income Tax Assistance Program (VITA) to assist with the ITIN applications.
5. The student's IRS form 1042 S can be updated through April 15th in the year following receipt of scholarship payments with the ITIN before it is sent to the IRS. Contact the Office of Accounting Scholarship and

Fellowship Services. This will facilitate a smoother refund process because the IRS can match the ITIN issued to the student to the 1042 S, which reports the amount of taxes withheld from the scholarship payments made to the student.

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 [International Office](#)