



RESEARCH FOUNDATION

DATE: 8/20/2013

TO: Principal Investigators and Project Directors

FROM: Paul Harris, Senior Director of Finance and Accounting *PEH*

SUBJECT: **STUDENT AWARD DISBURSEMENTS**

In accordance with IRS guidelines and a CSU Chancellor's Office recommendation, beginning fall 2013 all student awards previously disbursed by the SJSU Research Foundation will be disbursed by the Financial Aid and Scholarship Office. These student award payments include scholarships, fellowships, non-service stipends, books, supplies, and other related education awards.

Please note: All student awards from grants for tuition and fees will be processed through the Bursar's Office. Student awards for Non-SJSU students will be disbursed through the student's university of enrollment.

To initiate payment processing and ensure that the student receives award payment in a timely manner, please complete the following documents and submit them to your assigned SJSU Research Foundation Office of Sponsored Programs account analyst.

- Non-Service Stipend Award and Acceptance Letter (sample attached)
- Research Foundation Requisition signed by the authorized signer of the account (<http://www.sjsufoundation.org/pdf/requisition.pdf>)

Upon receipt of the completed **Non-Service Stipend Award and Acceptance Letter** and the **Research Foundation Requisition** your OSP analyst will:

1. Review for compliance against the grant award and approve payment,
2. Forward soft copies of the documents and the approval to the Financial Aid and Scholarship Office,
3. Forward hard copies of the documents to the Research Foundation Accounts Payable department.

Research Foundation Accounts Payable will then send payment for the award to the Financial Aid and Scholarship Office. The Financial Aid and Scholarship Office will ensure all resources received are in accordance with federal and state regulations and if so, will disburse the funds to the student's campus account.

If the student has a balance due to the University, the award will be applied to the balance due, and any excess will be distributed to the student. Distributions will be paid through the Bursar's Office on a weekly basis starting the first week of each semester. If you have any questions, please contact your sponsored programs analyst. We will make every effort to make this transition as smooth as possible. Thank you for your cooperation.



RESEARCH FOUNDATION

SAMPLE Non-Service Stipend Award & Acceptance Letter

Date:

Student Name:

Student Physical Address (no P.O. Box):

City, State, Zip Code:

Student Phone Number:

Re: Student Award Grant Number

Dear _____:

Congratulations! You have been selected to receive a student award for the (Semester/AY) from the (Project Name and Research Foundation account number) at San Jose State University. This project is funded by (Agency). Your award is contingent on the following conditions:

- 1.
2. (*List all conditions*)
- 3.

Please note: A true stipend is a payment made to an individual for his or her attendance or participation only—**not** for services rendered. The payment cannot be tied to “any obligation for past, present, or future services.” There can be no employer/employee relationship associated with a stipend payment.

The total amount of the **non-service** award is \$_____ to be paid (monthly, as scheduled, or one time). Payment for this award will be disbursed by the Financial Aid and Scholarship Office, and distribution will be paid through the Bursar’s Office to your student account.

The total amount of the **tuition and fees** award is \$_____. Payment for this award will be processed through the Bursar’s Office and applied to your student account.

Sincerely,

Name & Signature of Project Director

Award Acceptance

Your signature below certifies the following:

- I am a legal resident or citizen of the United States.
- _____ I am an SJSU Student. SJSU Student ID # _____
- _____ I am **not** an SJSU Student. Payment will be disbursed by my school’s Financial Aid Office.
University Name: _____ Student ID# _____
- I understand that this award does not represent payment for services required as a condition of the grant.
- I understand that this payment will be reported on the 1098T IRS tax form.
- I understand that all resources received may require adjustments to my financial aid award in accordance with federal and state regulations.
- **I have read and agree to the conditions stipulated above, and do hereby accept this award.**

Signature of Student (or Recipient): _____ Date: _____