

## ***Paying a Scholarship or Fellowship to a Foreign National for Academic Activities at Your Agency***

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**Name of Foreign National:** \_\_\_\_\_

**Date(s) of Stipend:** \_\_\_\_\_

### **Pre-arrival planning:**

- Finalize the payment details.
- Determine if foreign national is eligible for a tax treaty exemption:
  - If eligible, ask individual if he/she has a SSN or ITIN.
  - If no tax number, make an appointment for foreign national once at your agency to have a tax assessment performed. E-mail (customize) to set up appointment.
- Send award letter to the foreign national with the details of the scholarship or fellowship.

### **When the individual has arrived on campus:**

- Foreign national completes Foreign National Data Gathering Form
- Make a copy of identity page in passport (make sure copy is readable).
- Make copy of visa and/or port of entry stamp in passport (make sure copy is readable).
- If J-1 scholar, make a copy of DS 2019.
- If F-1 student, make a copy of I-20.
- For Canadians, make a copy of both driver's license and social insurance card OR a copy of passport identity page.
- If eligible for a tax treaty benefit, foreign national completes IRS Form W-8BEN, "Certificate of Foreign Status of Beneficial Owner for United States Withholding" and appropriate addendum.

**If eligible for tax treaty benefit and doesn't have a tax id number, foreign national:**

- Completes Form W-7.
- Keeps appointment for tax assessment to file for ITIN (see W-7 checklist for what to bring to appointment).

**Department completes the following and forwards to Accounting:**

- Payment entered into Accounting or Payroll System
- Completed Foreign National Data Gathering Form
- Copy of identity page in passport.
- Copy of visa and/or port of entry stamp in passport.
- If J-1 scholar, a copy of DS 2019.
- If F-1 student, a copy of I-20.
- For Canadians, copy of both driver's license and social insurance card OR copy of passport identity page.
- Completed W-8BEN and required addendum.

**Pay the foreign national**

- Department will pick up check from Accounting or Payroll Office **OR**
- Funds should be directly deposited into foreign national's U.S. bank account