



Large-Scale Grant

Grant

This grant can be used by Divinity School students toward **travel, accommodation, and/or conference registration fees** associated with:

- Presenting at academic conferences*
- Language-study that is necessary for and/or required by the student's degree program.**
- Research that is necessary for and/or required by the student's degree program.**

Eligibility

- Applicant must be a registered Divinity School student.
- *Documentation of presentation required. Please include the cover page of the conference brochure/schedule, plus the page noting your participation.

- **Statement of Relevance from Faculty Advisor required.
- Application must be submitted **at least 1 month prior** to the dates during which the award will be used.
- Reimbursement requests must be submitted **no later than 3 months after** the dates during which the reimbursable expenses were incurred.

Maximum Grant

- Students may receive **grants totaling a maximum of \$350 for domestic travel OR grants totaling a maximum of \$500 for international travel** from this category per year (first day of Autumn Quarter — last day of Summer Quarter).

Application Process

Step 1: Application

Complete applications must be submitted to fundingDSA@gmail.com **at least 1 month prior** to the dates during which the award will be used. In order to be considered for the award, a student must submit a fully completed application form (Note: reimbursement materials are not part of the application step).

Step 2: Reimbursement

Grant recipients will receive funds in the form of a reimbursement. Recipients must submit a complete reimbursement request to fundingDSA@gmail.com **no later than 3 months after** the dates during which the reimbursable expenses were incurred. Complete reimbursement requests include:

1. Reimbursement Request form
2. Documentation (if applicable)
3. Receipt copies documenting travel expenses
4. Student Reimbursement Certification Form
5. W-9 Form

NB: Reimbursement processing typically takes a minimum of 2-3 weeks.



Large-Scale Grant Application

I. Applicant Information

Name:		Student ID#:	
Address:		Email:	
City:	State:	Zip:	Phone:
Program:	Year:	Preferred Pronouns:	

Have you previously received a DSA Large-Scale Grant during the current academic year (first day Autumn Quarter — last day Summer Quarter)? If so, how much were you awarded? \$ _____

II. Proposed Use of Funds

Academic Conference / Language Study / Research Task
Title:
Description:
Dates:
Location:
Presentation accepted: YES _____ (submit proof of presentation) PENDING _____

III. Proposed Budget (please complete all relevant sections)

Item	Description	Cost
Conference Registration fees		\$
Accommodation		\$
Travel to/from destination		\$
	TOTAL	\$

IV. Other Awards/Resources

Please note any other awards, grants, or fellowships for which you have applied. DSA encourages all students to seek all possible sources of funding.

V. Faculty Advisory Approval

Please have your advisor submit a brief, 1-2 paragraph statement of the relevance/necessity of the proposed Language Study / Research Task to your current degree program. This is not a formal letter of recommendation. This can be submitted via email to fundingDSA@gmail.com.

VI. Signature

I certify that this information is true and complete, and given in good faith.

Signature _____

Date _____

Internal Use Only

Processed: _____ Date: _____

Amount Approved: _____



Large-Scale Reimbursement Request

I. Applicant Information

Name:			Student ID#:
Address:			Email:
City:	State:	Zip:	Phone:
Program:	Year:	Preferred Pronouns:	

My Large-Scale Grant application was approved on: _____.

II. Reimbursable Expenses

Item	Description	Cost
		\$
		\$
		\$
		\$
		\$
		\$
		\$
	TOTAL	\$

III. Other Awards/Resources

Please note any other awards, grants, or fellowships for which you have been awarded to cover the above enumerated expenses. DSA encourages all students to seek all possible sources of funding.

Item	Description	Cost
		\$
		\$
	TOTAL	\$

IV. Signature

Signature Date

<i>Internal Use Only</i>	
Processed: _____	Date: _____
Amount Approved: _____	



Student Certification for Business Related Travel Reimbursement

Please complete this form and attach to any student travel reimbursement which is certified to be business related travel. This certification must be completed by the student and certified by a University of Chicago faculty member or a Principal Investigator (PI) if payment is made from a Federal Grant.

To Be Completed by Student	
Student/Fellow Name:	
Student Identification Number:	Destination:
Travel Dates:	
Business Purpose:	
To Be Completed By University Faculty Member or Principal Investigator (PI)	
I certify that this student travel:	
<p>directly supports my project or research program, or</p> <p>is related to presenting at a conference (conference publication listing student is required), or</p> <p>is an integral (required) part of the student's degree work, or</p> <p>is official University business</p>	
Faculty Member/PI Name:	
Faculty/PI Signature:	Date:

Any reimbursement to an undergraduate, graduate student or Post Doctoral Fellow, which does not meet the above criteria for University business travel, is considered to be taxable scholarship income according to IRS regulations. US Citizens, Permanent Residents and Residents for Tax are not required to have any tax withholding, nor will a tax form be issued. However, any scholarship payments should be reported as income. Nonresidents for tax are required to have a federal withholding of 14% and a 1042S form will be issued at calendar yearend.

Request for Taxpayer Identification Number and Certification

Adapted for University of Chicago use only.

Give Form to the requester. Do not send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Are you a University of Chicago Student? Yes No If YES, provide Student ID# _____

Have you ever been employed by the University of Chicago? Yes No If YES, provide dates of employment: _____

If you are not a U.S. Citizen or Permanent Resident, please indicate your date of first entry into the U.S. _____ Visa classification upon first entry into the U.S. _____

1. Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2. Business name/disregarded entity name, if different from above

3. Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ►

C Corporation

S Corporation

Partnership

Trust/estate

4. Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5. Address (number, street, and apt. or suite no.) See instructions. Requester's name and address (optional)

6. City, state, and ZIP code

7. List account number(s) here (optional)

Print or type. See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

				-			-				
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or

Employer identification number

		-									
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Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Processing Student Reimbursement Payments

Student reimbursements are of a complex nature and the below explanations are not inclusive and determinations may need to be made on an individual basis.

The student travel payment is generally considered reimbursement (nontaxable, nonreportable) if:

- ▶ The primary purpose and original intent is for the University to obtain useful results from the project/research
- ▶ Results or research will be used by the University
- ▶ Research is performed to fulfill University's obligations to outside funding entity
- ▶ Activity is required for degree or credit
- ▶ Activity impacts the student's grade
- ▶ Student is presenting or actively participating in a conference or competition on behalf of the University

Examples of reimbursement:

- ▶ Student travels to Texas to represent the University in a scholastic competition.
- ▶ Student travels to Michigan to present at a conference, where the student's name is published (poster, website, brochure) as a presenter/contributor at the conference.
- ▶ Student travels to China to perform research, which happens to be the topic of her dissertation. The University would otherwise perform research on this topic, regardless of the student's research – the University is the primary beneficiary.

The student travel payment is generally considered to be scholarship (taxable, reportable) if:

- ▶ Reimbursement is made for activities in which the University is relatively disinterested or the research is student led
- ▶ The project/research's primary purpose and original intent is to further the student's education or training
- ▶ The University obtains little or no benefit
- ▶ Activities are performed to contribute to the development of the skills needed in the student's studies

Examples of Scholarship:

- ▶ Student travels to the United Kingdom for dissertation research which is not research the University would otherwise conduct – the student dissertation is the primary purpose of the travel – the student is the primary beneficiary.
- ▶ Student travels to a conference in Mexico as an attendee and does not present/contribute in official capacity.
- ▶ Student travels to China for Mandarin language training which will assist in language proficiency needed for degree. This is supplemental work that the student may need to succeed, but it is not a required part of the degree.

NOTE: If payment requires that the student perform services to receive the funding, this is considered wage/compensation. Payment should not be made as a reimbursement or scholarship; payment is required to be processed through Payroll.