

Externally Funded Research Grant Payment Form Fields

Student Info	Student to complete name and ID and sign acceptance of the requirements and disclosure of the award												
Funding Provider	Who is the external contract with? (HRC, MBIE)												
Department	The area supervising the student and authorising the form												
Start date of the award.	This must be the first of the month. Students are charged thesis enrolment by year or semester. If starting during the semester, they are charged from the 1 st of the month of commencement.												
Tenure of award:	How many months is the award for? Please indicate the full term of the award in months. i.e. Master's is usually 12 months, and PhD 36 months from the start of their enrolment. But any tenure can be awarded, as long as it fits within the student's enrolment or expected completion.												
Stipend/Emolument	What is the total amount to be paid to the student? This is the TOTAL amount of the award, not the annual amount. This value will be divided by the tenure and paid to the student on the third Thursday of each month. The stipend is GST exclusive												
Sundry Fees	Does the contract cover student services fees and/or Medical & Travel Insurance? <u>Student Services Fees</u> are invoiced per year (or per months of enrolment). <u>Medical & Travel Insurance</u> is charged per semester or year (it is not pro-rated if starting mid semester).												
Tuition Fees	Are tuition fees to be covered by the scholarship, and processed by the scholarship team? <u>Tuition fees</u> are charged per months of enrolment. Please provide the maximum amount of fees to be awarded for the entire award INCLUDING the sundry fees and GST. Please note tuition fees are charged inclusive of GST												
Award Notes	This is a blank area to indicate any info that may be important for the scholarship team. e.g.: <ul style="list-style-type: none"> • Student must have full-time enrolment • First 12 stipend payments \$15k per year, Next 24 stipend payments at \$30k per year, last 12 stipend payments \$15k per year. First 12 months fees 0.5FTE, Next 24 months fees 1.0 FTE, last 12 months fees 0.5 FTE Please note for full-time to part-time enrolment, calculation must be from 1 Jan or 1 Jul. The above option is not possible for someone starting part way through a semester.												
Account Number	What is the project account code that will be funding the stipend (and fee) payments? <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Project Number</th> <th>Suffix</th> <th>Funding Source</th> <th>Cost Centre</th> <th>Dissection Code</th> <th>Sub Dissection Code</th> </tr> </thead> <tbody> <tr> <td>NNNNNN</td> <td>NN</td> <td>A</td> <td>AA</td> <td>NNNN</td> <td>NN</td> </tr> </tbody> </table>	Project Number	Suffix	Funding Source	Cost Centre	Dissection Code	Sub Dissection Code	NNNNNN	NN	A	AA	NNNN	NN
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NNNNNN	NN	A	AA	NNNN	NN								
Research Office Reference	The individual code for the nominated project that can be referenced by the scholarship team if there are any questions.												
PL Account End Date	The date that the account will close as stated on Finance One.												
Account code active for duration of the award and Reason	If the above account is not currently open for the full duration of the award at the start of the award, please indicate why. e.g. variation request in process, the account will be available for the full award.												
Research and Enterprise Approval	The Research and Enterprise advisor or BDM has reviewed the award dates and funding details and agree all details are correct												
Payment Authorisation	Supervisor authorisation to release payment to the student.												

EXTERNALLY FUNDED RESEARCH GRANT Payment Form

Please complete, and email this form to: scholarships@otago.ac.nz

STUDENT TO COMPLETE

Student's Full Name		Student ID Number	
Requirements <ul style="list-style-type: none"> This Grant has been awarded on the following basis: I am currently enrolled at Otago University in a formal course of study. Funding is for educational purposes to support my current course of study. No employment relationship will be created or is intended to be created as a result of the provision of this Grant. 			
Disclosure <ul style="list-style-type: none"> The University of Otago and the student have entered into a scholarship agreement for educational purposes. The University of Otago and this student agree that no employment relationship between the parties exists or is intended to exist, and the scholarship agreement does not create such a relationship. The University believes the scholarship meets the requirements of section CW 36 of the Income Tax Act 2007 to be a tax-free scholarship. However, the student is responsible for establishing their tax position of any amounts received and to correctly account for tax on any receipt. The University does not intend to deduct tax from the payments the student receives, however, should the University be required to account to the IRD for tax on these payments, the University has the right to recover that tax from the student. Any changes to enrolment may impact the student's eligibility to receive scholarship payments and the student may be required to repay any overpayment of the scholarship back to the University of Otago. 			
Bank Account Details MUST be entered into your eVision portal. (Must be a NZ account. It is not possible to pay to a credit card account). Log into eVision and enter your bank account details via the My Finances section of eVision or go to Add bank account details in eVision https://ask.otago.ac.nz/knowledgebase/article/KA-10002408/en-us			
Student Signature			____ / ____ / 20 ____ Date

AWARD DETAILS

Funding Provider		Department	
Start Date of Award <i>(must be 1st of a month)</i>	01 / ____ / 20 ____	Tenure of Award	_____ Months
Total Stipend Amount GST excl <i>(for entire duration of award)</i>	\$ _____ <i>This amount will be divided by the tenure and paid into the student's bank account on the third Thursday of each month.</i>		
Sundry Fees GST incl	Student Services Fee to be paid? <input type="checkbox"/> YES <input type="checkbox"/> NO Medical & Travel Insurance to be paid? <input type="checkbox"/> YES <input type="checkbox"/> NO <i>(For International Students Only)</i>		
Tuition Fees GST incl <i>(in addition to the stipend amount above)</i>	Tuition fees to be paid? <input type="checkbox"/> YES <input type="checkbox"/> NO Maximum/Total Fees (including Sundry Fees) awarded \$ _____		
Award Notes			
Account Number	PL _____ <i>Dissection for stipends (3616), and tuition fees (3611), will be added when processing)</i>		
Research Office Reference		PL Account End Date	____ / ____ / 20 ____
Account code active for duration of the award	<input type="checkbox"/> YES <input type="checkbox"/> NO	Reason if "No"	
Research and Enterprise Approval	_____ Name	_____ Signature	____ / ____ / 20 ____ Date

PAYMENT AUTHORISATION

<ul style="list-style-type: none"> I confirm I am the supervisor of the above-named student. They will be enrolled at the University of Otago during the tenure of this award. I have delegated signing authority for the account code on this payment form. I will notify the Research Office of any enrolment changes that may affect the eligibility of this award. <i>(e.g. deferrals or PT-FT changes)</i> 			
Supervisor Authorisation	_____ Name	_____ Signature	____ / ____ / 20 ____ Date