

## Orientation Information for Research Experience Participants

Congratulations on your acceptance to the Research Experience for Undergraduates (REU) program at The University of Tennessee, Chattanooga (UTC)! We look forward to providing the support needed for a productive research experience for you and your mentors.

Participation in a research experience is a traineeship, which is a form of student aid and not a wage for work performed. As a part of your research experience, you will receive stipend payments and in some instances travel reimbursements.

### TRAVEL INFORMATION

You may be eligible for Travel Reimbursement from your program. Please contact your program director with any questions.

[PI - If your program allows for reimbursement, you may want to let them know up to what amount you will reimburse. Also let them know what required documentation like receipts and/or mileage logs they will need to supply to you and that food reimburses on a per diem basis.]

### STIPEND INFORMATION

- For UTC students:
  - Your stipend will process through financial aid.
- For Non-UTC students you payment will be issued as a vendor payment.
  - You need to be setup as a vendor through our PaymentWorks system. UTC will send you an invitation to the system to complete the proper forms.

### HOUSING AND SUBSISTENCE INFORMATION

You will have a room assigned to you upon your arrival. [General info about # roommates, etc.] [Consider general info about what they should bring i.e. linens, etc.] You will receive a Mocs card, which will give you access to the UTC dining hall, where you can get all of your meals, etc. [Program to provide details if different]. Please let your program director know if you will require a parking decal.

## **TAX INFORMATION**

The University of Tennessee is not required to report these non-wage stipend payments and travel reimbursements to the IRS, per [Treasury Regulation 1.6041-3 \(n\)](#). You will not receive a W2 tax form from UTC or a 1099 form.

However, these payments may be taxable under certain circumstances. It is important that you maintain your own tax records in order to prepare your annual federal income tax return.

For specific tax questions, please consult with your tax professional as UTC is not authorized to provide individual tax advice. You may also find it helpful to read IRS Publication 970, "*Tax Benefits for Education*," which is available at: <http://www.irs.gov/publications/p970/index.html> and the IRS's "*Tax Information for Students*" website at <https://www.irs.gov/individuals/students>. All other federal income tax forms and publications may be downloaded from the IRS web site at <http://www.irs.gov>.

## **FINANCIAL AID INFORMATION**

Under federal law, you are required to notify your Financial Aid Office of scholarship or fellowship payments that you receive to defray your educational costs. Please be sure to inform the Financial Aid Office at your home university about the funds you are receiving through the research experience program at UTC. The payments received from UTC may be taken into consideration when determining your financial aid eligibility at your home institution.

We trust you will find this information helpful. Should you have additional specific questions, please contact the department coordinating your research experience.

**Should include program director/other contact information**