

UNIVERSITY OF UTAH EDUCATIONAL/RESEARCH TRAINEESHIP PAYMENT FORM INSTRUCTIONS

RESTRICTIONS:

- **All traineeship payments on contracts and grants must be authorized by the awarding agency.**
- A traineeship is an amount paid to an individual to aid in the pursuit of study or research. A traineeship recipient may be:
 - An undergraduate student, graduate student, post-graduate fellow;
 - A participant who is participating in a training/educational conference or event.
- ANY UNIVERSITY EMPLOYEE (STUDENT OR NON-STUDENT) WHO WORKS ON, AND IS COMPENSATED BY A SPONSORED AWARD, CANNOT ALSO BE PAID AS A TRAINEE/PARTICIPANT ON THAT SAME SPONSORED AWARD. That person must either be classified as an employee or as a trainee/participant; they cannot be both.
- Payments to trainees and participants should only use account codes:
 - 62300-62304: Participant Support – Stipends
 - 66900: Scholarships/Fellowships
- **Use of Account Codes 62300-62304 (Participant Support –Stipend) should only be used when Participant Support Costs have specifically been awarded as a budget line item and there is a companion project for Participant Support Costs set up. Account Code 66900 should be used if there is no budget line for Participant Support Costs.** Participant Support Costs will typically be associated with NSF awards, but this expense type may occasionally be used by other Federal Government Agencies.
- Amounts paid as traineeships are not loans and no past, present, or future services are expected or required as a condition of the recipient receiving such payments. If these conditions change, the traineeship should be cancelled immediately and the department should take appropriate steps to pay the recipient for services rendered through the University payroll system. Since a traineeship is not pay for services rendered, the traineeship payment CANNOT be paid through payroll.

COMPLETION OF FORM:

Section I – Recipient Information

Please complete all items to facilitate the timely processing of the traineeship. If the recipient is a University student or employee, then enter their UNID; if the recipient is not associated with the University, then enter the last 4 digits of their Social Security Number and have the recipient complete a W-9 form (<https://www.irs.gov/pub/irs-pdf/fw9.pdf>) to be submitted with this form.

Non-resident aliens are required to complete registration with the Tax Services Office. Payment cannot be made until this registration is completed. To make an appointment, verify information, or receive instructions on how to register, call Tax Services at 581-5414. TAXES WITHHELD: In the event the non-resident alien does not choose to meet with the Tax Services Office and/or does not qualify for an exemption, 14 percent of the traineeship amount will be withheld and remitted to the Internal Revenue Service.

Section II – Payment Explanation

Please provide a brief explanation describing what the payment. The short explanation is to simply identify what the payment is for. The explanation should not be more than one or two sentences long. This will help AP to quickly determine if the payment can be made using this form.

Examples:

- This is for a 6 month Post Doc Fellowship.
- This payment is for participation in a Research Experience for Undergraduate Research (REU).
- A training conference is being held on (DATE) and this single payment is to pay a stipend for the recipient’s attendance.

Section III – Payment Information

All information in this section is important to avoid problems with the payment of the traineeship. This information will affect the total amount paid to the traineeship recipient as well as the number of payments received. What follows is a review of the various payment types and examples of each. If payments are coming from two different chartfield’s – complete both Section II payment boxes.

SINGLE PAYMENTS:

1. Enter the Chartfield(s) that payment will be made from;
2. Enter the payment amounts in the ‘ePR Amount’ fields.
3. These totals and subtotals will calculate and update automatically.

Educational/Research Traineeship Grants Payment(s) - On a Project							Supplemental Traineeship Payment(s) - On an Activity (see Policies 7-011 and 7-012)						
BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U	BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U
01	00000	0000		00000000	0000	1	01	00000	0000	00000		00000	1

Initial Payment: → ePR Amount: <input style="width: 100px;" type="text" value="500.00"/>	Initial Payment: → ePR Amount: <input style="width: 100px;" type="text" value="250.00"/>
Recurring Pmt: <input type="text"/> <input type="text"/> <input type="text" value="0.00"/> Start Month: <input type="text"/>	Recurring Payment: <input type="text"/> <input type="text"/> <input type="text" value="0.00"/>
Final Pmt: → <input type="text"/> End Month: <input type="text"/>	Final Payment: → <input type="text"/>
Scheduled Total: → <input type="text" value="0.00"/>	Scheduled Total: → <input type="text" value="0.00"/>
Project Total: → <input style="background-color: yellow;" type="text" value="500.00"/>	Activity Total: → <input style="background-color: yellow;" type="text" value="250.00"/>
ePR Total: <input style="background-color: yellow;" type="text" value="750.00"/> + Scheduled Total: <input type="text" value="0.00"/> = Grand Total: <input style="background-color: yellow;" type="text" value="750.00"/>	

MULTIPLE (RECURRING) MONTHLY PAYMENTS:

Multiple payments to be made to a recipient must total to three (3) or more payments. If only two payments need to be made, then the department will either need to submit separate payment requests or consider combining the two payments into one. Also see ‘Periodic Payments Other Than Monthly’ below.

For multiple monthly payments, all payments can be the same, or the first and last payment amounts can be different from the other payment amounts.

1. Enter the chartfields
2. Enter the first payment amounts. These will be released by ePR as soon as the request is approved.
3. Enter the equal recurring payments in terms of the number of months and the recurring monthly amount.
4. Indicate the start and end month. *Note that the start month must be an open accounting period.*
5. Enter any remainder left over for the last month's payment.
6. The totals and subtotals will calculate and update automatically.

Educational/Research Traineeship Grants Payment(s) - On a Project							Supplemental Traineeship Payment(s) - On an Activity (see Policies 7-011 and 7-012)						
BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U	BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U
01	00000	0000			00000	1	01	00000	0000	00000		00000	1

Initial Payment:	ePR Amount:	500.00	Initial Payment:	ePR Amount:	250.00
Recurring Pmt: <input type="text" value="5"/> <input type="text" value="1,000.00"/> <input type="text" value="5,000.00"/>			Recurring Payment: <input type="text" value="5"/> <input type="text" value="200.00"/> <input type="text" value="1,000.00"/>		
Final Pmt:	<input type="text" value="250.00"/>		Final Payment:	<input type="text" value="250.00"/>	
Scheduled Total:	<input type="text" value="5,250.00"/>		Scheduled Total:	<input type="text" value="1,250.00"/>	
Project Total:	<input type="text" value="5,750.00"/>		Activity Total:	<input type="text" value="1,500.00"/>	
ePR Total: <input type="text" value="750.00"/>	+ Scheduled Total <input type="text" value="6,500.00"/>	=	Grand Total: <input type="text" value="7,250.00"/>		

PERIODIC PAYMENTS OTHER THAN MONTHLY:

Multiple payments in the PeopleSoft system can only be set up to be paid monthly. Any payment schedules that are other-than-monthly will need to be submitted separately by the department.

Section IV – ATTESTATION

- Required signatures on this form are as follows:
- Principle Investigator or Department Chair

This signature certifies that no services to the University, past, present, or future are required from the recipient.

PROCESSING AND PAYMENT:

Completed Traineeship forms will be processed when submitted through ePR using the “Scholarship / Fellowship / Traineeship” Payment Type and the “Traineeship” Business Purpose. The first payment will be released as soon as *the request completes workflow*. Subsequent scheduled requests will release on or around the first of each month as indicated by the schedule requested. Note that requests must be submitted against open accounting periods. If the first payment is meant for a future accounting month, wait to submit until the first scheduled payment month is open. Except when paying a Non-resident Alien, recurring payments are required to be made via Direct Deposit. Be sure to submit a new Direct Deposit Authorization form with each round of recurring payments. Direct Deposit is not required for single payments.