



## UNIVERSITY OF UTAH APPLICATION FOR TRAINEESHIP INSTRUCTIONS

When using the electronic version of the **Application for Traineeship** payment form, please ensure that each form has a new **SFXXXXXXXX** number. This number appears in the upper right-hand corner. If this number doesn't appear, try using Internet Explorer, a different browser, or update your Acrobat Reader to the latest version for your browser. To obtain a new number please press reset, or close and reopen the form.

**Do not modify an existing form and send it in with the same number. Contact Accounts Payable, 801-581-6976, if you experience difficulties with this form.**

### RESTRICTIONS

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 or post-graduate fellow. Amounts paid as traineeships are not loans and no past, present or future services required as a condition of receiving such amount. 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 cannot be used as the method to pay for services rendered, a traineeship payment does not create an employer/employee relationship.

This form should be used to process training grants from organizations such as NSA, NSF and NIH. The form should be used only for recurring payments that need to be encumbered. Traineeships paid through an award from the Public Health Service and/or other federal agencies must attach additional required forms which may include "Statement of Appointment of Trainee", "Payback Agreement" or "Delinquency on Federal Debt." The dates and amounts on these forms must agree with the Traineeship form. All traineeship payments on contracts and grants must be authorized by the awarding agency.

### COMPLETION OF FORM

#### ***Section I – Recipient Information***

Please complete all items to facilitate the timely processing of the traineeship.

Non-resident aliens are required to complete the [\*\*Nonresident Alien Data Collection Form\*\*](#) in the Tax Services Office. Payment cannot be made until this form is completed. To make an appointment, verify information or receive instructions on what documents to bring, 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 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 chartfields – complete both Section II payment boxes. The Total for All Payments field will auto fill and should agree with the monthly amount due to the trainee.

**MULTIPLE (RECURRING) MONTHLY PAYMENTS**

For multiple monthly payments, evenly divide the total amount to be paid by the number of months the recipient will receive payments. The only exception to this will be the first and last month’s payments, which don’t need to be the same amount as the equal payments. (See Example Two)

<i>Example One: Monthly recurring payments – equal payment</i>						
BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U
Start Date	01/01/12		End Date	12/31/12		
First Month	January 2012		@	\$ 2,500.00		
Equal Payments	10	@	\$ 2,500.00	=	\$ 25,000.00	
No. of payments, excluding first and last month						
Last Month	December 2012		@	\$ 2,500.00		
<b>TOTAL AMOUNT TO BE PAID</b>				<b>\$ 30,000.00</b>		
If you complete Section II, do not fill in Section III						

**Example Two: Monthly recurring payments with different  
payment amounts in first and last month**

BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U
Start Date	01/01/12		End Date	12/31/12		
First Month	January 2012		@	\$ 2,000.00		
Equal Payments	10	@	\$ 2,700.00	=	\$ 27,000.00	
No. of payments, excluding first and last month						
Last Month	December 2012		@	\$ 1,000.00		
<b>TOTAL AMOUNT TO BE PAID</b>				<b>\$ 30,000.00</b>		
If you complete Section II, do not fill in Section III						

**PERIODIC PAYMENTS**

This payment plan should be used for all payment types. In the example below, the two payments of \$7,500 could be scheduled for release in June and September. When selecting periodic payments, please indicate in the right margin the specific months when the releases should occur.

<i>Example Three: Periodic payments</i>						
BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U
Start Date	01/01/12		End Date	12/31/12		
First Month	January 2012		@	\$ 7,500.00		
Equal Payments	2	@	\$ 7,500.00	=	\$ 15,000.00	<i>June September</i>
No. of payments, excluding first and last month			@	\$ 7,500.00		
Last Month	December 2012		@	\$ 7,500.00		
<b>TOTAL AMOUNT TO BE PAID</b>				<b>\$ 30,000.00</b>		
If you complete Section II, do not fill in Section III						

### **Section III – Termination**

If a traineeship is to be terminated prior to the original end date, this section should be completed by indicating the termination date and activity/project where the costs were being charged. Section I must also be completed to validate a new end date. If you complete Section III, do not use Section II.

### **Approvals**

Required signatures on this form are as follows:

- Department Chairperson or Principle Investigator
- Dean of College

These signatures authorize the payment of the traineeship, approve the traineeship charge to the listed chartfield, and certify that no services to the University, past, present or future are required from the recipient.

### **PROCESSING AND PAYMENT**

Completed Traineeship forms are due in Accounts Payable by *the 15<sup>th</sup> of the month preceding the month in which the first recurring payment is to be received*. For example, if the first payment is scheduled to be received in December, Accounts Payable must have received the form by November 15<sup>th</sup>. All recurring payments are processed at the beginning of the month, and checks are distributed within the following 2 – 3 business days. Recurring payments can be made via either check or Direct Deposit. Please refer to the direct deposit discussion and forms located on the [Accounts Payable website](#).