THE UNIVERSITY OF UTAH

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EDUCATIONAL/RESEARCH TRAINEESHIP PAYMENT FORM INSTRUCTIONS

FORM NUMBERING:

When using the electronic version of the **EDUCATIONAL/RESEARCH 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 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 if you experience difficulties with this form.

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. The "Total for All Payments to be Made" field will auto populate and should agree with the monthly amount due to the trainee.

INDICATE IF IT IS MULTIPLE PAYMENTS OR A SINGLE PAYMENT:
Check the appropriate box;

☐ **Multiple Payments** ☐ **Single Payment**

SINGLE PAYMENTS:

- Enter the Chartfield(s) that payment will be made from;
- Enter the payment date in the 'Start Date (or Single Pmt date)' field;
- Enter the payment amount in the 'Total Amount to be Paid (of Single Pmt Amount)' field.

BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U

Start Date *(or Single Pmt date)*: 1/20/20XX End Date: _____

First Month: _____ Amount: $_____

Equal Payments _____ @ $_____ = $_____
(# of payments, excluding first and last month)

Last Month: _____ Amount: $_____

TOTAL AMOUNT TO BE PAID *(or Single Pmt Amount)*: $_____500____

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.

- Enter the 'Start Date' or the date the first payment should be made on;

- Enter the 'End Date' or the date the last payment should be made on;
- Enter the 'First Month' when payments begin;
- Enter the First Month payment 'Amount';
- Enter the number of 'Equal Payments' to be made (less the first and last month);
- Enter the amount of each individual 'Equal Payments' to be made;
- Enter the total amount of all the 'Equal Payments' to be made (3 of payments multiplied by amount of each payment)
- Enter the 'Last Month' when payments will end;
- Enter the last month payment 'Amount';
- Add up all payments to be made and enter that amount on the 'Total Amount to be Paid' line.

Example: All payments are the same.

BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U

Start Date *(or Single Pmt date)*: 1/20/20XX End Date: 12/20/20XX

First Month: January Amount: $ 3,000.00

Equal Payments 10 @ $ 3,000.00 = $ 30,000.00
(# of payments, excluding first and last month)

Last Month: December Amount: $ 3,000.00

TOTAL AMOUNT TO BE PAID *(or Single Pmt Amount)*: $ 36,000.00

Example: First and Last Months' payments are different.

BU	ORG	FUND	ACTIVITY	PROJECT	ACCOUNT	A/U

Start Date *(or Single Pmt date)*: 1/20/20XX End Date: 12/20/20XX

First Month: January Amount: $ 2,000.00

Equal Payments 10 @ $ 3,300.00 = $ 33,000.00
(# of payments, excluding first and last month)

Last Month: December Amount: $ 1,000.00

TOTAL AMOUNT TO BE PAID *(or Single Pmt Amount)*: $ 36,000.00

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 – Early Payment Termination

If a traineeship is to be terminated prior to the original end date, a new form must be completed. This section should indicate the termination date and activity/project where the costs are being charged. If you complete Section IV of this form, do not complete Section III.

Section V – Approvals

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

These signatures authorize the payment(s) of the traineeship amount(s), approve the traineeship charge(s) 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 of the month preceding the month in which the first recurring payment is to be made to the recipient. For example, if the first payment is scheduled to be received in December, Accounts Payable must have received the form by November 15th. All recurring payments are processed at the beginning of the month. Recurring payments will be made via Direct Deposit, except for Non-resident Aliens, who will receive a paper check.