

Trainee/Fellowship DocuSign PowerForm Routing Overview

Requester

- Department Contact
- Assigns funding approvers and trainee/fellow
- Enter appointment details

Trainee/Fellow

- Enters citizenship, mailing address; completes W9, ACH
- Non-US citizens connected to HR
- Signs, acknowledging potential tax implications

PI or Fund Authority

- PI – signs for OSP/VP RED funds
- Fund Authority – signs for non-OSP/VPRED funds

UBS AP (cc)

- Receives a copy of the W9 and ACH - sets up vendor
- Will not process payment until BPA is received via normal channel

Fellowships Oversight

- Reviews forms for accuracy
- Reassigns to appropriate FSS contact/dept accountant for BPA processing (BPA will not include W8/W9)

OSP FM or Dept Head/Director

- OSP FM – signs for OSP/VPRED funds
- Dept Head/Director – signs for non-OSP/VPRED funds

Foreign Tax Specialist (cc)

- Receives a copy of the form if trainee/fellow checked non-US citizen box
- Reaches out to trainee/fellow to complete Sprintax Questionnaire

Financial Aid (cc)

- Receives copy of the form; reflects award on Fin Aid package

Graduate School (cc)

- Receives a copy of the form if trainee/fellow checked Grad box
- Applies in-state tuition if the trainee/fellow is eligible