

Montana State University- Trainee and Fellowship Appointment Form Instructions and Information

1. The appointing department will initiate a “Trainee and Fellowship Appointment” using the form link on the UBS Forms website <https://www.montana.edu/ubs/forms.html>. This form link will initiate a secure DocuSign package that the initiator will be able to view in their DocuSign account. The package will include the appointment form, and, depending on the trainee/fellow’s citizenship, a W9, ACH form, and upload for a voided check or bank letter. Please note that the ACH form is required for all US citizens in order for MSU to process a Trainee and Fellowship payment.
 - a. Required signatories include:
 - i. OSP/VP RED (4W, 4WA, 436/7/8) funded Trainee and Fellowships:
 1. Student
 2. PI
 3. OSP Fiscal Manager
 - ii. Non-OSP funded Trainee and Fellowships:
 1. Student
 2. Fund Authority
 3. Department Head/Director (might be the same as the Fund Authority)
2. Completed forms will be received by the following groups:
 - a. The completed Trainee/Fellowship Appointment form will be received by fellowships@montana.edu as a DocuSign initialer. The staff monitoring fellowships@montana.edu will ensure that the Trainee/Fellowship Appointment form has been accurately completed and will reassign their “initialing” role to the appropriate FSS team member or departmental accountant for BPA processing.
 - b. A copy of the completed Trainee/Fellowship Appointment form will be received by Financial Aid.
 - c. The Grad School will receive a copy of the Trainee/Fellowship Appointment form for any Grad Students appointed to a fellowship; the Grad School will determine if the grad trainee/fellows is eligible for in-state tuition.
 - d. MSU’s Foreign Tax Specialist will receive a copy of the Appointment form for any non-US citizens. The Foreign Tax Specialist will reach out to the trainee/fellow and have them complete a questionnaire in Sprintax that will determine if they should complete a W8 or W9. Once completed, the Foreign Tax Specialist will forward the W8 or W9 to UBS Accounts Payable.
 - e. UBS Accounts Payable will receive all forms:
 - i. US citizens: Appointment form, W9 and ACH form
 - ii. Non-US citizens: Appointment form and (optional) ACH form

UBS Accounts Payable will not process payment until a BPA is received via the normal channels.
3. Using the Trainee/Fellowship Appointment form, FSS or the departmental accountant will create a single BPA to submit to UBS AP (example BPA on next page). UBS AP will book all required payments from the single BPA, and payments will be automatically released in Banner on the first business day of the month or per the requested customized schedule. Please see #5 for form deadlines. FSS/Departmental Accountants will not need to submit a BPA to UBS AP every month.
 - a. All addresses listed for the student (appointment form, W9, ACH) should be the current mailing address, not the permanent address. If payment needs to be mailed to the trainee/fellow’s department, this will be noted on the appointment form, and FSS or the departmental accountant should list the department PO Box on the BPA.
4. ACH (direct deposit for vendor payments) is required for all trainees/fellows who are US citizens and is optional for non-US citizens depending on whether they have a US bank account. ACH payments will be made via direct deposit within the first five business days of the month or the first five days following the custom payment schedule. The first payment after ACH is set up, however, must be a paper check. Paper checks will be printed in Helena, MT and mailed to the address on the fellowship appointment form on the 2nd business day of the month (or the day following the first payment date of the custom schedule). Please anticipate time for mail delivery.
5. To establish an appointment, Trainee/Fellowship Appointment forms must be received by fellowships@montana.edu by the 15th day of the month preceding the appointment begin date. The requestor will need to ensure that the form progresses through the first two steps (“PI or Fund Authority” signature and “OSP FM or Dept Head/Director” signature) of the DocuSign queue in a timely fashion.
 - a. Trainee/fellowship forms received after the 15th of the month preceding the appointment begin date will be processed as quickly as possible, but the first payment date cannot be guaranteed for late forms.
 - b. For non-US citizens, payment timing on the first trainee/fellowship payment will be dependent on how quickly the trainee/fellow completes the Sprintax questionnaire. Failure to complete the questionnaire in a timely fashion may result in payment delay.
6. If the trainee/fellowship needs to be modified or terminated, the requestor will need to submit a term/mod form available in the PII version of DocuSign.
7. Any questions regarding trainee and fellowship payments should be directed to fellowships@montana.edu.