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

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

**PI or Fund Authority**
- PI – signs for OSP/VP RED funds
- Fund Authority – 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

**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

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