



# Fellow/Trainee Payment Solution -Update-

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# Background

- Trainee/Fellows require monthly or annual stipend amount
  - Comply with sponsor terms and conditions that cannot be adjusted.
  - Sponsor's set pay rate, FTE, and payroll dates which cannot be altered to fit the biweekly calendar.
  - Altering employment data can raise flags during audits and appear that someone was paid incorrectly.
- Transition to biweekly payroll impacted stipend amounts that do not align with accurate pay based on sponsor terms and conditions.

# Background

- Some A-basis appointments may result in overpayment based on sponsor terms and conditions and the biweekly pay periods.
  - A-basis and full academic year C-basis appointments may result in correct payment depending on begin and end dates
- Single semester C-basis appointments may result in underpayments
- Impacted Titles:
  - Advanced Opportunity Fellow (SA001), Predoctoral fellows (SA002), Predoctoral Trainees (SA013), Postdoctoral Trainees (PD004) and Postdoctoral Fellows (PD003)

# Fellow/Trainee Payment Solution

- **Overpayment Solution: Small recurring negative payroll adjustments in HRS to avoid over payments**
  - No overpayment collections or reduced final check
  - Smooths payment schedule
  - Prevents overcharges for departments
  - Mitigates overpayment for early terminations
- Additional Pay code created to process adjustments: **'SGA - Stipend-Grant Adjustment-No IC'**
  - Also works for nonexempt
  - Enter using negative dollar amounts
  - Explanation in the Description field
- Adjustments taken on full pay periods only

# Update – Tools added to JEMS-Hire

- F/T Calc button – Fellow/Trainee Calculation
  - Job tab
  - **'Print F/T Calc Report'**
- Same calculations as the Fellow/Trainee Adjustments Calculator using information entered for the hire in JEMS
  - Uses effective date, expected end date, pay basis and comp rate
  - No duplicate entry
  - Expands and contracts pay periods based on appointment duration
- Report is printable for documentation if needed

# F/T Calc Report in JEMS

(Validated for this Status)

FINISHED - ENTERED IN HRS

[Save](#)  
[Close](#)  
[Print](#)

[Find/Add Hire](#) | [Person](#) | [Person Contact](#) | [Position](#) | [Job](#) | [Benefits](#) | [HR Contact](#) | [Comments](#) | [Status History](#)

Job Data

**Hire / Transfer**

Hire Type\*  [🔍](#) [Override](#) Empl Rcd#  [🔍](#)

Action  Action Reason  [🔍](#)

Effective Date\*

Business Title

Expected End Date  Non-Service Relationship

Criminal Background Check (CBC Date)

Position of Trust  [🔍](#)

Probation Type

Probation End Date

Seasonal Status

Additional Pay/Lump Sum

Salary Threshold Exemption

**Compensation**

Pay Basis\*  [🔍](#) Comp Rate\*  [Conversion Calculator](#)  
[Print F/T Calc Report](#)

# F/T Calc Report in JEMS

Pay Basis C Session Code AY

Award Amount: 23727  
 BW Stipend Amount: 1216.77

PP Start Date	PP End Date	Check Date	Num Days	Period Rate	SGA Amount	Adjusted Payment
08/14/2022	08/27/2022	09/08/2022	5	608.38	0	608.38
08/28/2022	09/10/2022	09/22/2022	10	1216.77	0	1216.77
09/11/2022	09/24/2022	10/06/2022	10	1216.77	0	1216.77
09/25/2022	10/08/2022	10/20/2022	10	1216.77	0	1216.77
10/09/2022	10/22/2022	11/03/2022	10	1216.77	0	1216.77
10/23/2022	11/05/2022	11/17/2022	10	1216.77	0	1216.77
11/06/2022	11/19/2022	12/01/2022	10	1216.77	0	1216.77
11/20/2022	12/03/2022	12/15/2022	10	1216.77	0	1216.77
12/04/2022	12/17/2022	12/29/2022	10	1216.77	0	1216.77
12/18/2022	12/31/2022	01/12/2023	10	1216.77	0	1216.77
01/01/2023	01/14/2023	01/26/2023	10	1216.77	0	1216.77
01/15/2023	01/28/2023	02/09/2023	10	1216.77	0	1216.77
01/29/2023	02/11/2023	02/23/2023	10	1216.77	0	1216.77
02/12/2023	02/25/2023	03/09/2023	10	1216.77	0	1216.77
02/26/2023	03/11/2023	03/23/2023	10	1216.77	0	1216.77
03/12/2023	03/25/2023	04/06/2023	10	1216.77	0	1216.77
03/26/2023	04/08/2023	04/20/2023	10	1216.77	0	1216.77
04/09/2023	04/22/2023	05/04/2023	10	1216.77	0	1216.77
04/23/2023	05/06/2023	05/18/2023	10	1216.77	0	1216.77
05/07/2023	05/20/2023	06/01/2023	10	1216.77	0	1216.77
05/21/2023	06/03/2023	06/15/2023	0	0	0	0

Total Pay 23727  
 Balance 0

# Update – JEMS Soft Edits

- **Soft edits to alert when:**
- C-basis fellow/trainee jobs are not within AY
- Dates do not match S1/S2 dates
- Job is entered for multiple years





# Update – Tools added to JEMS-Hires

- Fellow/Trainee Audit report
  - Advanced Search tab
  - **'Fellow/Trainee Audit'**
- Report to review all Fellow/Trainee appointment details, stipend amounts, under/over balance, and SGA amounts
- Uses Department field as the parameter
- Defaults to January 1 – December 31 of the current year
  - Enter dates in the Job Date Range fields prior to running report for custom date range

# Fellow/Trainee Audit Report in JEMS

JEMS Search Screen

**JEM System Search** Close

Quick Search **Advanced Search** Advanced Search Results

**Advanced Search**

Department: contains

Empl Class: contains

Job Code: contains

Hire Type: =

Pay Basis: =

Continuity Code: =

PVL Number From:  To:

Job Date Range:  To:

Status Date Range: 04/27/2022 To: 10/27/2022

JobApply Ind (Y/N):

Search Clear

**Fellow/Trainee Audit**

**Multiple Selection Criteria**  
You may make more than one selection for this Criteria. Use Shift-Click for contiguous selection. Control-click for selecting non-contiguous elements.

Current Status

- Cancelled
- Department Approved
- Division Approved
- Division Approved-Sent To Hrs
- Division Hold
- Draft
- Entered
- Finished - Entered In Hrs

Clear

# Fellow/Trainee Audit Report in JEMS

- Fields: Empl ID, Empl Rec, Name, Dates, Rates, Job Code, DeptID, Reports To, Pay Basis, Session Code, Biweekly amounts, Under Over Balance, SGA Amount

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Empl ID	Empl Rcd	Person Name	Effdt	Expected End Date	HRS Entered End Date	Comprate	Semester Award Amount	Jobcode	DeptID	Reports To	UW Pay Basis	Session Code	BW Stipend Amount	Pay Amount	Under Over Balance	SGA Amount
2	353562	0	KRUSCHKE,JESSE LYNN	6-Jan-22	22-May-22	21-Aug-22	22909	11454.5	SA002	A487000	C	S2		1174.82	11395.76	-58.74	-6.53
3	353562	0	KRUSCHKE,JESSE LYNN	22-Aug-22	21-May-23	20-Aug-23	23727		SA002	A487000	C	AY		1216.77	23727	0	0
4	568916	0	BLOCK,JOY E	22-Aug-22	21-May-23	20-Aug-23	23727		SA002	A483800	2287143	C	AY	1216.77	23727	0	0
5	588395	0	PALZOM-PASHA,KARMA	6-Jan-22	22-May-22	21-Aug-22	22909	11454.5	SA002	A483800	C	S2		1174.82	11395.76	-58.74	-6.53
6	591738	0	SMITH,DONIQUA	22-Aug-22	21-May-23	20-Aug-23	23727		SA002	A484400	C	AY		1216.77	23727	0	0
7	717558	0	BARNES,JAMES ROBERT	6-Jan-22	22-May-22	21-Aug-22	26000	13000	SA002	A484000	C	S2		1333.33	12933.33	-66.67	-7.41
8	717659	0	POLYAKOVA,TAMARA	22-Aug-22	21-May-23	20-Aug-23	23727		SA002	A483800	2287143	C	AY	1216.77	23727	0	0
9	723801	0	FISHER,RACHEL	1-Jan-22	31-Dec-22	31-Dec-22	28000		SA002	A489600	A	FY		1076.92	28000	0	0
10	727546	0	BLACK,COREY	1-Sep-22	31-Aug-23	31-Aug-23	29000		SA001	A485100	A	FY		1115.38	29111.54	111.54	4.46
11	742908	0	SULLIVAN,NICHOLAS B	6-Jan-22	22-May-22	21-Aug-22	22909	11454.5	SA002	A483200	C	S2		1174.82	11395.76	-58.74	-6.53
12	749264	0	COTTER,LYNNE MARGALIT	6-Jan-22	22-May-22	21-Aug-22	20000	10000	SA002	A484900	C	S2		1025.64	9948.72	-51.28	-5.7
13	750063	0	NESS,RICHARD M	22-Aug-22	21-May-23	20-Aug-23	38844		PD003	A482400	1424040	C	AY	1992	38844	0	0
14	768657	0	HATZOPOULOS,IRENE	6-Jan-22	22-May-22	21-Aug-22	22909	11454.5	SA002	A482600	C	S2		1174.82	11395.76	-58.74	-6.53

# Underpayments

- **Underpayments:** Amount paid is below the stipend rate
- Lump Sum Payment at or near the end of the appointment
  - Paid through Add'l Pay
  - **Earnings Code = STL**
  - Explanation in the Description field should include explanation of stipend award amount, amount paid through biweekly.

# Impacts of Changes & Late Notifications

- **Changes:** Early termination, rate increases, extensions may impact the adjustment amount
- Review and manually recalculate adjustment
  - Overpaid: update SGA amount or process check correction
  - Underpaid: lump sum
- **Late Notifications:** Shortened appointment periods due to late hires or missed SGA adjustment
- SGA adjustment amounts should be adjusted to be spread out over the appointment
  - Catch up adjustment not needed

# Resources

- [Fellow/Trainee Adjustment Calculator](#) – manually adjustments
  - [Tipsheet](#)
- Additional resources on the [Payroll Toolkit](#) page
- Language for letters in the Recruitment Toolkit
  - [Fellow/Trainee Stipend Adjustment Language](#)
  - Reminder to add the correct language to letters