

Postdoctoral Fellow
Postdoctoral Trainee

- A postdoctoral fellow or traineeship is an award, usually funded extramurally, to an individual for the purpose of continued training after receipt of the doctorate. The appointing unit must verify that all requirements for the doctorate (possibly M.D., D.V.M., or J.D. for special fellowships) have been satisfactorily completed before the first day of any appointment using these titles. For example, the successful completion of an oral defense of a Ph.D. is not sufficient. The actual filing of the final thesis is required prior to the beginning date of the appointment. A person eligible for a postdoctoral fellowship or traineeship is usually within five years of having received the doctorate. Most of these awards are for two-year terms.
- Appointments as postdoctoral fellows and postdoctoral trainees should be made only if it can be demonstrated that the appointee's activities are primarily for the benefit of the appointee's own learning and research. Otherwise, it is more appropriate to use an employment title such as researcher or scientist. Employment titles apply whenever the duties assigned are under the direct supervision and control of the employer and are primarily for the benefit of the University or granting agency. The work of individuals appointed as postdoctoral fellows or postdoctoral trainees should be independent or self-directed, subject only to such supervision as might be given by a teacher to a student.
- These criteria do not prevent the university of the extramural source of funds from receiving some benefit from the appointee's activities. Activities still may be of value to the extramural grantor, or may be useful internally to the university in satisfaction of other grant or contract requirements. The test is whether the work undertaken by the appointee is a necessary and relevant part of the appointee's learning program. However, the "primary benefit" test outlined above does forbid assigning tasks to the appointee which are unnecessary and irrelevant to the learning program or are repetitive beyond that which is necessary to achieve excellence in the activity, even if these tasks do not constitute the major portion of the appointee's activities.
- Except in rare cases, stipends paid to postdoctoral fellows or trainees are not excludable from gross income for purposes of income tax and thus are fully taxable. Since such stipends are not wages, however, the University will not withhold taxes from monthly stipend checks. Therefore, trainees and fellows may be required to pay estimated taxes on a quarterly basis.
- Postdoctoral Fellow (X10NN)
I-9 Required-No; CBC Required-No
- Postdoctoral Trainee (X30NN)
I-9 Required-No; CBC Required-No