**TEMPLATE LETTER STARTS ON PAGE 2**
**INFORMATION:**

[Office of Postdoctoral Studies](Office%20of%20Postdoctoral%20Studies) <https://postdoc.wisc.edu/>

**Post Degree Training Appointments – Research Associate**

* A research associateship is normally for a **two- or three-year term, up to a maximum of five years**, and is normally given to an individual who is within five years of having received the doctorate.
* Per the Unclassified Title Guidelines, the term for postdoctoral post degree training titles is for a maximum of five years: <https://www.ohr.wisc.edu/polproced/utg/EITtitles.html>
* Please note that time at another university as a postdoc will likely count toward the five-year limit at UW-Madison.
* For more details see the Research Associate Appointments and Postdoctoral Fellow/Trainee FAQ document <http://www.ohr.wisc.edu/polproced/uppp/0102_D.pdf>
* Extensions over three years, up to a maximum of five years, requires annual approval by the Dean's office HR prior to each year extension and must include a statement by the department indicating why training is continuing.

**PVL waiver**Training completion for post degree training titles - This waiver reason only applies to Research Associate and Postdoctoral Fellow/Trainee within the [post degree training titles](http://www.ohr.wisc.edu/polproced/UTG/EITtitles.html). The training completion reason is appropriate only for individuals who have completed their training and are switching to an academic staff title (e.g., Researcher or Scientist) in the same unit. It is not appropriate for an individual to compete for their own position, and therefore they should be hired using this waiver instead of through open recruitment. The post degree training must have been in the same position, in the same unit (UDDS), for at least 1.5 years for the training completion waiver reason to be appropriate.

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**COLLEGE OF LETTERS AND SCIENCE**

**EMAIL DRAFT TO YOUR HR BUSINESS PARTNER FOR APPROVAL BEFORE ISSUING LETTER**

**RESEARCH ASSOCIATE LETTER**

[date]

[name and address]

Dear [name]:

(*Add the following paragraph for* ***exempt*** *positions, remove if non-exempt)*

On behalf of [name of Department/Center] at the University of Wisconsin-Madison I am pleased to offer you a post degree training appointment as Research Associate effective [start date]. You will be collaborating with [name of professor] training in [specialization/project description]. Your gross biweekly pay will be $[biweekly rate] which is based on a full-time [academic (nine-month) **OR** annual (twelve-month)] rate of $[salary] at [percentage]% time. I anticipate that your appointment will continue at least through [end date], contingent upon your training progress and satisfactory performance, the availability of funding, and program needs.

(*Add the following three paragraphs for* ***non-exempt*** *positions, remove if exempt)*

On behalf of [name of Department/Center] at the University of Wisconsin-Madison I am pleased to offer you a post degree training appointment as Research Associate effective [start date]. You will be collaborating with [name of professor] training in [specialization/project description]. This is a [percentage]% time appointment and you will be compensated at an hourly rate of $[hourly rate] per hour based on the full‑time [academic (nine-month) **OR** annual (twelve-month)] rate of $[salary]. I anticipate that your appointment will continue at least through [end date], contingent upon your training progress and satisfactory performance, the availability of funding, and program needs.

This position will be staff non-exempt (paid hourly; overtime eligible) as a result of the changes made by the U.S. Department of Labor to the Fair Labor Standards Act (FLSA) (see <https://www.dol.gov/whd/overtime2019/>). The changes require positions exempt from overtime to be paid $35,568 annually.

Your new position is not included in a certified bargaining unit, and it is non-exempt under the Fair Labor Standards Act provision for overtime. Should your supervisor assign overtime hours, you will be paid at a premium rate or shall be credited with compensatory time off at a rate of 1.5 hours per hour worked, for all hours worked in excess of 40 hours in a work week. At the discretion of the employer, compensatory time credits may be provided as payment for overtime. Such compensatory time credits received may be preserved, used or cashed out at the discretion of the employer.

This offer is contingent upon completion of the requirements for the Ph.D. prior to the effective date of your appointment. A copy of your diploma or a letter certifying you have completed all necessary requirements for graduation from your Ph.D. institution will be required prior to your appointment begin date.

(*Add the following paragraph for* ***a-basis*** *positions, remove if c-basis)*

You are eligible for two types of absence with pay:

1. **Absence with pay (personal):** Hours when a postdoc may be absent from their training for personal purposes, and still receive their stipend or salary. The amount of leave granted for full-time postdocs is **176 hours** per fiscal year (July 1-June 30).
2. **Absence with pay (medical):** Hours a postdoc may be absent from their training due to personal and immediate family medical reasons, or for the birth or adoption of their child, and still receive their stipend or salary. The amount of leave granted for full-time postdocs is **96 hours** per fiscal year (July 1-June 30).

Postdocs in appointments less than full-time are granted amounts based on their percentage of appointment. For postdocs who begin their appointments during the year, absence with pay is prorated based on the start date of the appointment. You can view your absence with pay balances in your MyUW Portal.

(*Add the following paragraph for* ***c-basis*** *positions, remove if a-basis)*

You are eligible for **absence with pay (medical),** hours a postdoc may be absent from their training due to personal and immediate family medical reasons, or for the birth or adoption of their child, and still receive their stipend or salary. The amount of leave granted for full-time postdocs is **96 hours**per academic year. Postdocs in appointments less than full-time are granted amounts based on their percentage of appointment. For postdocs who begin their appointments during the year, absence with pay is prorated based on the start date of the appointment. You can view your absence with pay balances in your MyUW Portal.

You are also eligible for the same **nine legal holidays** as are provided to employees.

Important: Postdocs who change FTE (full time equivalent) may be required to refund any absence with pay or legal holidays used in excess of the prorated amount to which they are eligible. Postdocs who terminate their appointment before the end of the fiscal year may be required to refund any absence with pay or legal holidays used in excess of the prorated amount to which they are eligible.

Full details are provided in UW–Madison policy [UW-5088 Postdoc Absence with Pay & Legal Holidays](https://policy.wisc.edu/library/UW-5088).

This position includes the fringe benefits described at <https://www.wisconsin.edu/ohrwd/benefits/download/grad.pdf>. Since the enrollment period for many of the benefit programs is within 30 days of your appointment begin date, please contact [name of benefits coordinator] at [location] within the first few days of your appointment to avoid any loss of benefits or the need to submit evidence of insurability. A benefits walkthrough tool can be found at <https://uwservice.wisconsin.edu/ebenefits/>.

Your Research Associate salary is, in most cases, subject to income taxes. See <https://www.ohr.wisc.edu/payroll/taxes.aspx> for tax information pertinent to US citizens, permanent resident aliens (green card holders), or resident aliens.

If you are on a nonimmigrant visa and are subsequently offered a fellowship or award, you must consult with the International Faculty and Staff Services (IFSS) office (ischolars@ohr.wisc.edu) before accepting the fellowship or award. Accepting a fellowship or award may very well require changes in your immigration status that take time, so the earlier you contact IFSS, the better. Individuals in H-1B status may not be classified as Postdoctoral Trainees.

(*Add this paragraph, if on J-1 visa)*

Please note: Applications for individuals seeking J-1 immigration status sponsored by the University may be subject to additional screening activities to ensure compliance with the federal export control regulations. If you have questions about export control regulations, please contact the University’s [Export Control office](https://research.wisc.edu/integrity-and-other-requirements/export-control/).

Please refer to the Letter of Offer Attachment for additional terms of employment and information of which you need to be aware. By beginning your appointment/employment at the University, you agree to be bound by the terms of employment contained in this Letter and the Letter of Offer Attachment. Your employment is contingent upon verification of your identity and work authorization within three days of your first day of employment as required by federal law. Please note that Section 1 of the Form I-9 must be completed electronically on or before your date of hire. Also see [name of I-9 coordinator] in the departmental office within three days to complete the I-9 form. Please refer to the attachment which lists the documents you may use.

The Office of Postdoctoral Studies is available to assist you during your training period, especially in the areas of career planning and professional development. Visit the Office of Postdoctoral Studies website (<https://postdoc.wisc.edu>) for more information on the activities and services provided for postdoctoral researchers. Questions and suggestions for the office should be directed to contact@postdoc.wisc.edu.

UW-Madison recommends that all graduate students and postdoctoral researchers utilize Individual Development Plans to set academic and career goals and facilitate conversations with their mentor(s). Beginning October 1, 2014, all graduate students and postdoctoral researchers supported by NIH funding are required to have an Individual Development Plan (IDP). Visit the Graduate School's IDP website (<https://grad.wisc.edu/pd/idp>) for templates, advice and supporting resources.

UW-Madison prohibits discrimination against applicants, employees, students, and visitors to campus who wish to participate in university programs or activities. Information about relevant law, policies, resources and complaint procedures and protected bases is available at: <https://compliance.wisc.edu/eo-complaint/>.

All employees, faculty and staff are strongly encouraged to help make the University a drug-free workplace. You can do this by learning about substance abuse (its dangers and warning signs), encouraging others to avoid substance abuse, and getting help if you need it—either for yourself or for someone you are concerned about. Please review the “UW-Madison Compliance with the Drug-Free Schools & Communities Act”, which is provided to all employees as part of their orientation to the University community. This document can be found at: <https://alcoholanddruginfo.students.wisc.edu/dfsac-act/>.

It is the policy of UW-Madison to provide reasonable accommodations for qualified individuals with disabilities. If you need a reasonable accommodation to perform the essential functions of your position, please contact [HR Manager], Divisional Disability Representative (DDR) at [HR Manager phone number] or [HR Manager email]. The DDR is the person authorized to receive and maintain confidential medical information in our College. More information can be found at the following website: <https://employeedisabilities.wisc.edu/>

We look forward to a mutually rewarding working relationship with you.

Sincerely,

[name of person signing letter]

[title of person signing letter]

Enclosures:

Offer Letter Attachment with List of Acceptable Documents for I-9

Offer Research Associate Tax Info

xc: [name of any individuals to be copied]

**Offer Research Associate TAX Info**

**RESEARCH ASSOCIATE TAX WITHHOLDING**

**(Attachment to the Research Associate Appointment Letter)**

Your Research Associate appointment is considered an employee position and your salary is considered wages (compensation for services performed) and is subject to income taxes.

**U.S. Citizens:** If you are a United States citizen, the University must withhold Federal and Wisconsin State income taxes according to the information you placed on your W-4 form. You are also subject to Social Security and Medicare tax.

**Resident Aliens:** If you are a resident alien, you are subject to tax in the same manner as a U.S. citizen (explained above), unless there is a tax treaty between your country of tax residence and the United States. You must complete the entry on the Glacier account opened for you by the University of Wisconsin payroll office and provide us with a copy of the Tax Summary Report, copies of all listed documents and all Glacier generated forms. If you are eligible for a tax treaty benefit, the treaty may exclude either all or a portion of your salary from the Federal and Wisconsin State income taxes. You will still be subject to the Social Security and Medicare taxes.

**Nonresident Aliens:** If you are a nonresident alien, we are required to withhold Federal and Wisconsin State income tax from your salary unless there is a tax treaty between your country of tax residence and the United States that excludes either all or a portion of your salary from the Federal and Wisconsin State income tax withholding. In the year in which you pass the IRS Substantial Presence Test you will be charged Social Security and Medicare taxes from the first paycheck of that calendar year. You must complete the entry on the Glacier account opened for you by the University of Wisconsin payroll office and provide us with a copy of the Tax Summary Report, copies of all listed documents and all Glacier generated forms.

If you are from a country that does not have a tax treaty that excludes you from tax withholding, we must withhold Federal and State tax on the basis of Single tax filing status, 1 exemption (unless you fall under one of the countries with specified exceptions) and any applicable gross up amount.

**Tax Treaty Benefits:** If you are eligible to claim a tax treaty withholding exemption, you will be notified through the completion of your Glacier account. To obtain general information regarding treaties please refer to Internal Revenue Service Publication 901, U.S. Tax Treaties through the web at <http://www.irs.gov/>

For additional information or questions, please contact the central payroll office on your campus. You can refer to the following website: <https://uwservice.wisc.edu/tax/filing-resources/>.