

**Interim Business Process – Affiliate Trainee Stipend Billing Agreement**

**Purpose:** A business process for executing and signing trainee stipend billing agreements helps to ensure that stipends and other trainee costs are charged appropriately and that the institution paying the trainee is aware of its obligations under the training grant. The risk of not adhering to this process is that costs will not be charged appropriately.

**Standards of Service:**

Department: The department is responsible for preparing the initial draft of outgoing Trainee Stipend Billing Agreements using the attached template.

SRA: The SRA is responsible for reviewing the initial draft for both outgoing and incoming Trainee Stipend Billing Agreements and finalizing them in consultation with the department.

AD: The AD is responsible for signing the Agreement.

**Considerations:**

Affiliates: Has [GUIDANCE ON BILLING AGREEMENTS BETWEEN HARVARD AFFILIATED INSTITUTIONS](#) been consulted?

- a) Statement of Appointment Form: Has the Statement of Appointment Form been attached to the Agreement and does the information coincide with the information in the Agreement, specifically dates and funds budgeted for stipend, tuition, and fees?
- b) Budget: Have F&A costs been excluded? (F&A costs are reserved for grantee institution.)

<b>Process Steps for Outgoing Trainee Stipend Billing Agreements (Training grant at HSPH; trainee at affiliate)</b>		
<b>Step</b>	<b>Role</b>	<b>Task/Activity</b>
1	Dept	Prepares draft Trainee Billing Agreement using attached template.
2	SRA	Reviews Agreement and makes any necessary changes in conjunction with department.
3	AD	Signs Agreement.
4	Dept.	Sends partially executed Agreement to affiliate institution; copies SRA.
5	Dept.	Upon receipt, sends copy of fully executed Agreement to SRA.
6	SRA	Forwards copy of fully executed Agreement to Ops.
7	Ops	1) Establishes new subactivity for trainee with the following naming convention: Trainee Last Name_Affiliate Abbreviation_Y1 2) Ops allocates only stipend with associated F&A and tuition to trainee-specific subactivity; 3) Trainee Travel and TRE remain in HSPH subactivities.
8	Dept	Charges stipend to trainee-specific subactivity using object code 7900, inserting trainee last name in description 1.

1. **Note: if the trainee is taking courses at Harvard, the agreement should not include funds for tuition. Those funds should remain at Harvard. Likewise, costs such as travel should not be included if HSPH PI is responsible for approving and HSPH is responsible for payment.**

**Process Steps for Incoming Trainee Stipend Billing Agreements (Training grant at affiliate: trainee at HSPH)**

<b>Step</b>	<b>Role</b>	<b>Task/Activity</b>
1	Dept	Enters request in GMAS; inserts "Billing Agreement" before project title.
2	SRA	Reviews Agreement and makes any necessary changes in conjunction with department.
3	AD	Signs Agreement.
4	SRA	Sends signed Agreement to other institution.
5	SRA	Sends copy of fully executed Agreement to department and Ops.
6	Ops	Sets up new fund in GMAS. Confirms that "Billing Agreement" appears first in project title.
7	Dept	Pays trainee stipend using appropriate stipend (non-employee) object code: 6440 for pre-docs, 6450 for post-docs. Includes trainee's name and Affiliate abbreviation in transaction description.

**Please note: Salary Billing Agreements are covered under a separate process.**