



## Process for Appointing Postdocs with Dual Appointments

In order to ensure that Postdoctoral Appointees are taxed appropriately, it will be necessary at times to create dual appointments for postdocs supported from different types of funding dollars. In such cases, the benefits will follow the primary appointment, with primary appointment defined as the % of effort (funding) greater than 50%. Thus, Postdoctoral Appointees are not permitted a 50/50 split between funding types. The process to appoint such postdocs is outlined below:

1. Generate a 520 form for each appointment.
2. For the primary appointment form: note in remarks that it is for the postdoc's primary appointment.\*
3. For the secondary appointment: note in remarks that it is for the postdoc's secondary appointment and that it is "TAR-NOT BENEFIT ELIGIBLE".
4. Submission
  - a. Hard copy submission: staple the two forms together so that it is clear that they belong together before submitting to the Dean's office for signature. Leave the forms stapled together for submission to the HRSC.
  - b. Email submission: email the two forms in one pdf file with a note in the subject line and in the email that this is for a dual-appointment postdoc. The Dean's office will forward the note with the approval.

\*Please note that this includes externally funded postdocs. In cases where the external funding is the greater source of funding, the primary appointment will be the 0094 no-pay appointment.

### Tools

*The templates below represent the most common types of dual appointments. If you have a different combination of job codes, please contact Sharon McCullough at 273-1619 to discuss.*

Offer Letter Template for 0093 Primary Appointment, 0094 Secondary Appointment\*:

<http://www.urmc.rochester.edu/education/graduate/home/documents/pd-dual-93-94-offer.doc>

Offer Letter Template for 0095 Primary Appointment, 0093 Secondary Appointment:

<http://www.urmc.rochester.edu/education/graduate/home/documents/pd-dual-95-93-offer.doc>

Offer Letter Template for 0094 Primary Appointment, 0093 Secondary Appointment:

<http://www.urmc.rochester.edu/education/graduate/home/documents/pd-dual-94-93-offer.doc>