

## Welch Support Tracking and Verification in FMP

In order to track two very important requirements of The Welch Foundation concerning postdoctoral fellows paid on its funding, the College's Filemaker Pro payroll system has been updated and the instructions below are guidelines for using the updated features to track and monitor postdoctoral fellows supported on Welch funding:

The Welch guidelines states that postdoctoral fellows should not be paid on Welch funding if any one or both of the conditions below exist:

1. Postdoctoral fellow has been awarded their Ph.D more than 5 years ago.
2. Postdoctoral fellow has been supported on Welch funding for more than a total of 3 years.

The fields added to track these requirements are on the *Employee Information* screen and they are:

1. Date Ph.D awarded
2. No. of Years since Ph.D Awarded\*\*
3. Prior No. of Months on Welch
4. Current No. of Months supported on Welch\*\*
5. No. of years Support on Welch\*\*

(\*\* Fields are automatically populated)

* Required Fields Push <b>Assignment</b> button to go to the next screen				First	Prev	Next	Last
Staff - Research	37 Doctorate	White, Non-Hispanic	ACTIVE				
Employee Type	Education Level	Ethnic	Status				
12/2005	8 month(s)	0	+	3	=	3 month(s)	
Date PhD Awarded	No. of Year Since PhD Awarded	Prior No. Months on Welch		Current No. of Months supported on Welch		No. of Year Supported on Welch	
	(if font is red, Welch restricts any support)					(if font is red, Welch restricts any support)	
Comment							

Enter the [Date PhD Awarded](#). To obtain this date, payroll staff, during sign up will request from the prospective postdoctoral fellow, a copy of their transcript or diploma. If this is not done, the information must be verified the first time a request is made by a PI to support the postdoctoral fellow on Welch funding.

The [No. of Years Since Ph.D Awarded](#) will calculate automatically. If it is more than 5 years, do not support the postdoctoral fellow on Welch funding. There is no need for further verification. If it is less then five years continue to next field.

Enter the [Prior No. of months on Welch](#). This should include all months supported by Welch from the hire date of the post doc or the Ph.D date (which ever is more recent) to the 8/31 of the previous FY. At the end of each fiscal year 2006 when assignment is being archived, the number of years supported on Welch will be moved to Prior No. of Months by IT staff. This way the count will be carried over for review.

The [Current No. of Months Supported on Welch](#) will calculate automatically by pulling the information from the current Fiscal year assignment data base. (Be sure that there is only one FY in the assignment data base)

The [No. of Years Supported on Welch field](#) will calculate automatically. If this is over 3 years, do not support postdoctoral fellow on Welch funding.

## THE WELCH LETTER

The Welch letter must be printed, verified and signed for the three types of employees supported on Welch funding:

- Postdoctoral Fellowship
- Predoctoral Fellowship (graduate students)
- Undergraduate Scholarship



When the Welch letter is printed for Postdoctoral fellowships, it must contain the following information:

- Year Degree Conferred
- Year of Welch Funding (Circle one) 1 2 3

The Welch letter can be printed from the Filemaker Pro *Current Assignment* screen using the button at the bottom of each assignment panel, labeled “Print Welch Ltr.”

Calabretta, Michelle K.		0184645	452692232	
Name		Employee ID		Social Security Number
38625	50104	100	Monthly	6/1/2006
Speedtype	Sub	* Salary	* Distri- Acct Code	* Type
				* Begin Date
				* End Date
				Total
				Round
				* FTE
				* Pay Rate
01001580	POST DOCTORAL FELLOW 1		2,666.67	8,000.01
* Position #	Job Title		Monthly Salary	Total Salary
			Fringe	Total Fringe
150.00	0.00	0.00	0.00	2,204.72
Insurance Stipend	Summer Insurance	Longevity	Miscellaneous Pay	
			Information	Monthly
Advisor			Life Insurance	2.28
Position		Monthly Form	Print Welch Ltr	Post to Main
Delete Assignment		Repost	Posted to Main Successfully	

Clicking on the button displays the Welch letter:

<p>Current Assignment    Print    MAIN MENU   Record 13421</p> <p>Budget No. 38625 Grant No. E-1498 Department Chemistry Faculty Advisor Cai</p> <p>Dear Michelle Calabretta,</p> <p>I am pleased to inform you that you have been appointed as a Robert A. Welch Foundation Fellowship/Scholarship recipient in the amount of \$2666.67 per month for the period beginning 6/1/2006 and ending 8/31/2006 (FTE: .100%). At this time, the total amount of the award is \$8000.01. This appointment may be terminated if satisfactory academic progress is not maintained, or if work performance falls below a satisfactory level.</p> <p>The primary purpose of the award is for the education and training of the recipient in advanced education and research. Predoctoral Fellowship and Undergraduate Scholarship recipients are required to be registered as a student in official courses involving basic chemical research for the duration of this appointment. Proof of enrollment is required to validate your appointment.</p> <p>If you choose to leave the program prior to the end of this appointment, the terminating date for the appointment will then be jointly determined by your faculty advisor the chair of the Department of Chemistry, and the appointee.</p> <p>We congratulate you on this award and hope that it will provide you support in your educational activities at the University of Houston.</p> <p>Chair, Department of Chemistry _____ Date _____</p> <p><b>Type of Award</b>  <input type="checkbox"/> Postdoctoral Fellowship  <input checked="" type="checkbox"/> Year Degree Conferred December 2005          Year of Welch Funding: _____  <input type="checkbox"/> Predoctoral Fellowship  <input type="checkbox"/> Undergraduate Scholarship  <input type="checkbox"/> Joint Appointment: Agency _____ Account No. _____ FTE (%) _____</p> <p>Michelle Calabretta, Acceptance by Appointee _____ Date _____</p>	<ul style="list-style-type: none"> <li>• Verify that the information is correct</li> <li>• Print the letter by clicking on the print button on the top right of the letter.</li> <li>• Have the Chairman sign</li> <li>• Distribute to the postdoctoral fellow for signature and verification.</li> <li>• Make sure that the signed letter is returned by the postdoctoral fellow</li> <li>• A copy is given to the fellow and one is kept with the PAR .</li> </ul>
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