

Instructions for filling out appointment letters

Always use the Updated Template

These appointment letter templates are being tweaked on a regular basis as we strive to meet the requirements of the Collective Bargaining Agreement. Please return to this website each time you need to send a letter to get the most up-to-date template. Do not use templates from previous letters as they may not be the most recent.

Choose the Right Template

There are 6 templates for you to choose from depending on the status of the job, the student's degree program, and how the student is paid:

For Instructional Services Roles:

- For a PhD, EdD, or dual-degree PhD student (JD/PhD, MD/PhD, VMD/PhD) in a Teaching or Other Instructional Support role who is fulfilling a program requirement and therefore doctoral stipend is compensation for the role
- For a PhD, EdD, or dual-degree PhD student (JD/PhD, MD/PhD, VMD/PhD) in a Teaching or Other Instructional Support role that is not a program requirement and is therefore paid a set sum for the appointment independent of any stipend
- For a master's (professional or research), or professional degree student in a Teaching or Other Instructional Support role

For Research Services Roles:

- For a PhD, EdD, or dual-degree PhD student (i.e., JD/PhD, MD/PhD, VMD/PhD) in a Research role who is fulfilling a doctoral program requirement and therefore doctoral stipend is compensation for the role
- For a PhD, EdD, or dual-degree PhD student (i.e., JD/PhD, MD/PhD, VMD/PhD) in a Research role that is not a doctoral program requirement and is therefore paid a set sum for the appointment independent of any stipend
- For a master's (professional or research), or professional degree student in a Research role

Please select the appropriate template based on the student's status and the nature of the role.

Timing of Appointment Letters

Students should be input into Workday at the same time as the Appointment Letter is sent. In the event that a letter is delayed until after the student starts the role, the student **must** be entered into Workday by the time they start the appointment.

Whenever possible, letters should be provided to students at least 14 days in advance of the appointment start date. If you are unable to provide an appointment letter in advance, you **must** provide the letter no later than the first day worked.

Filling out the Template

All sections of the form must be completed. Do not delete or add or reorder sections.

Titles

The Appointment Title and Business Title you select on the template must match what you enter into Workday. For doctoral students, there may only be one appropriate title that you can use; in those cases the title is pre-populated in the templates.

Instructional titles:

- Union-Teaching Fellow: can only be used for doctoral students fulfilling a program requirement. This is a monthly paid role.
- Union-Teaching Assistant: can only be used for doctoral students whose instructional role is not a program requirement. This is a monthly paid role.
- Union-Instructional Services SW: can only be used for master's or professional students in instructional roles who are not receiving work study. This is a weekly paid role, and timesheets must be completed.
- Union-Work Study On Campus Instructional Services: can only be used for master's or professional students in instructional roles who are receiving work study. This is a weekly paid role, and timesheets must be completed.

Research titles:

- Union-Research Fellow/Pre-Doctoral Trainee: should only be used for doctoral students who are fulfilling an academic research requirement. This is a monthly paid role. For these students there are proscribed Business titles from which you must choose:
 - Research Fellow: should only be used for doctoral students receiving 100% University funding.
 - Pre-Doctoral Trainee: should only be used for doctoral students who receive Pre-Doctoral Trainee external funding and no University funding.
 - Research Fellow and Pre-Doctoral Trainee: should only be used for doctoral students receiving both University funding and Pre-Doctoral Trainee external funding.
- Union-Research Assistant: can only be used for doctoral students whose research role is not an academic research requirement. This is a monthly paid role.
- Union-Research Services SW: can only be used for master's or professional students in research roles who are not receiving work study. This is a weekly paid role, and timesheets must be completed.
- Union-Work Study On Campus Research Services: can only be used for master's or professional students in research roles who are receiving work study. This is a weekly paid role, and timesheets must be completed.

For students with a NRSA grant, place the student in a Union-Research Fellow/Post Doctoral Trainee role. When entering their compensation, use the NRSA Pre-Doctoral Trainee allowance plan to record the amount permitted under the grant. Any remaining compensation needed to bring the student to the minimum should be entered as base pay on the job profile. This ensures that the portion of the student's funding paid from the grant receives proper tax treatment.

Appointment End Date

For research students whose appointment is ongoing, you can type in an anticipated end point, such as "last semester of enrollment," but you must also include "with specific end date to be determined then." And you must follow up with a specific end date in writing when it is known. As with all appointments, you must end the appointment in Workday on the last day of the student's service. In Workday, you must also submit a request to end the job or terminate the student, using the known end date.

Estimated Number of Hours/Week

You must provide a good-faith estimate of the number of hours/week required for the job. The collective bargaining agreement recognizes that graduate workers often are engaged in work that cannot be precisely standardized or measured in relation to a given period of time and that the time necessary to accomplish an assignment may vary from week to week.

Compensation

Doctoral students and dual degree doctoral students must be paid monthly. Master's and professional students must be paid weekly based on the hours worked that week. As such, master's and professional students will need to complete timesheets that must be approved weekly in Workday.

You will need to monitor that, on average, the hours being worked are consistent with the estimated number of hours/week in the appointment letter and in Workday. If they are not, then some action needs to be taken, for example, a conversation with the graduate worker if they are not performing as expected or an updated appointment letter if it has been determined that the actual hours are in fact more or less than what was originally expected.

You must ensure that the student's job is ended in Workday as of the correct end date and that the end date is updated as necessary if the appointment changes. Compensation payments will end automatically on the end date of that job. If the end date is incorrect, the student may either continue to be paid after the appointment ends or stop being paid even though the appointment is continuing.

Equal Monthly Payments

In almost all cases, doctoral students with an instructional or research appointment that is not required by their program will be paid in equal monthly installments for each full month of work performed over the term of the appointment. This is the default payment schedule. If the first and/or last month of the appointment is partial, payment for those months will be prorated accordingly.

Unequal Payments

If there is an operational reason why equal monthly payments are unworkable in a particular situation, you may contact SolutionCenter@upenn.edu to discuss whether an alternative payment schedule may be used and, if so, how it may be implemented. Please understand that permission to pay in unequal installments will be approved only in very limited circumstances, and there will be additional administrative burdens associated with doing so.

Duties

It is critical that the information in the "Description of duties for this appointment" section be accurate. The following are some of the activities that are often required for instructional and research roles. This is for consideration only. If you are not sure what duties may be required, it is better to be overinclusive than underinclusive. It is also recommended that you include a catchall in case additional duties may be assigned (e.g., you could include "other duties as assigned").

- For instructional roles: Please include duties such as: leading sections, holding office hours, grading assignments, attending lectures, etc. Please include scheduled meetings or trainings (if known).
- For research roles: Please include duties such as: writing code, performing experiments, maintaining equipment, mentoring lab members, etc. Please include scheduled meetings or trainings (if known).

Training

A student's academic program will decide whether TA Training is required for the students in that program, and the academic program is responsible for informing its students about training requirements. Any additional training requirements that are set by the appointment must be communicated by the hiring unit.

Additional Instructions

If you do not know the correct response for any of the sections, you should ask the manager for the role, or the student's Department/Graduate Group Chair and/or Department/Graduate Group Coordinator. It is critical that all of the information in the appointment letter be accurate.

If you are hiring a doctoral student in their 5th year who had only 4 years of guaranteed funding, the student must receive tuition and fee remission in addition to their compensation if certain conditions are met, specifically if the Graduate Workers: (1) remains in good academic standing, (2) is not receiving funding from any other source (internal or external) that would fully cover the Graduate Worker's tuition and fees, and (3) holds a covered position (i.e., a position performing instructional or research services) where the expectation is that the Graduate Worker will perform 20 hours of work per week on average during the semester.

Sending the Letter

Once the template is complete and correct, save a copy and email it as an attachment to the student, with a cc: to the student's Graduate Group/Department Chair and Departmental Business Coordinator.

You must also attach the appointment letter directly to the appropriate Workday business processes such as Hire, Change Job, or Add Additional Job. Use Hire when you are hiring a student into their first job at the University. Use Change Job when the student already has been hired into the job and you are changing an aspect of the job, such as the number of hours/week. Use Add Additional Job when you are hiring a student who has a current job that they are keeping, and you are hiring them into a separate job.

If a student in a research role did not receive a specific end date (i.e., the letter stated "until the last semester of enrollment last semester of enrollment with specific end date to be determined then"), you must provide the student with a letter confirming the actual end date, once it is known, and you must put the end date into Workday.

Once the term of the appointment is ended, the job must promptly be ended in Workday OR terminate the student in Workday if they have left the University.

In the event the position described in the appointment letter becomes unavailable for any reason, you must make reasonable efforts to identify a comparable position for the Graduate Worker for the duration of the original appointment and those efforts should be documented. There is no requirement, however, that the Graduate Workers be placed in a comparable position.

Onboarding

If this is the Graduate Worker's first employment role with the University, they will need to complete the Onboarding, Form I-9 and Social Security Number Verification processes described at the end of the appointment letter. The appointment is contingent upon the Graduate Worker timely and appropriately doing so. In particular, Section 2 of the Form I-9 must be completed within 3 business days of the Graduate Worker's hire date (i.e., if the Graduate Worker's hire date is a Monday, then Section 2 must be completed

by Thursday of that same week), and failure to timely do so will result in termination of the appointment and the Graduate Worker's inability to serve in the role.

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