



**Excluded Student Pay Action Form - Instructions**

**Department Information**

**Department** – Provide your Department Name

**Department ID** – Provide your 6-digit Department ID Number

**Nature of Action** – Indicate one of the following: New Appointment, Appointment Extension, Extension/Change in Job Code, Combo Code/Chartfield String Change, Additional Pay, Rate Change

**Personal Information**

**Person ID #** – All information in the Payroll/ HR system is processed by PERSON ID numbers. If the individual was or is a student at the university indicate the student number. If the individual was previously employed at the university a Person ID number would have been assigned. Use Search Match in HCM to find the Person ID number. Duplicate Person ID numbers - ensure you have done a thorough and complete search prior to creating a Person ID number.

**Date of Birth** – The Date of Birth information is mandatory. The date is used in determining eligibility for deductions such as Canada Pension Plan (CPP). Format should be yyyy/mm/dd.

**Social Insurance #** – The Social Insurance Number (SIN) is used to administer many government benefits including CPP and Employment Insurance. Every person working in Canada must have a SIN. Employees are required by law to show proof of their SIN by presenting a SIN card, letter (confirmation of SIN) or other documentation showing the SIN within 3 days of beginning employment and failure to do so is subject to a penalty of \$100.

**Immigration Status** – Must indicate the appropriate citizenship status. If the individual has a Study/Work Permit – must indicate the expiry date and a copy of the entry papers must accompany the appointment form. For all non-Canadians you must indicate the country of citizenship.

**Address** – The Home Address is required to ensure staff receive their T4's.

**Phone** – Indicate Residence and Business Phone numbers.

**Hire Details and Categories**

**Hours/Wk** – Indicate the standard hours per week the employee is working

**Bargaining Unit** – EXS (Excluded Student)

**Employee Class** – Excluded Student

**Union Code** – EXC (Excluded Student)

**Job Code** – Indicate one of the following: S0034 Undergrad Student Scholarship, S0039 Scholarship, Bursary, Awards (Undergraduate), E0004 Excluded Student Hourly

**Reports to (Supervisor) Name** – Must provide the Supervisors name, along with ID or Position number

**Compensation**

**Total Compensation** – Represent the total amount of Regular salary

**Payment Frequency** – Indicate one of the following: Hourly, Monthly, or One Time Payment

**Effective Date / End Date** – Indicate the dates of appointment. Format should be yyyy/mm/dd.

**Payment Type** – Indicate Regular Salary or Scholarship

**% Distribution** – You may use additional lines to further split the payment type among different accounts.

**Earn Code** – Complete if known

**Combo Code OR Chartfield String**– the payment cannot be processed without a complete and active combo code or chartfield String

**Amount** – total amount to be paid for the appointment period for this combo code or chartfield string