



APPOINTMENT SET-UP FORM INSTRUCTIONS

(revised August 27, 2009)

Submit the appointment information at least **10-working days** PRIOR to the actual start date. Late start appointments will delay the payment process. ALL sections of the form must be completed.

- EMPLOYEE INFORMATION:** Ensure that both names are spelled correctly. Employee number, if available, SIN, and Date of Birth are required fields, as well as the student section.
- RECENT CHANGES IN PERSONAL INFORMATION:** If an employee HAS NEVER worked in the department before, they are required to complete a "Personal Information Form", "Direct Deposit Authorization", and provide a copy of the SIN card. Without these documents the appropriate appointment can not be initiated. If the employee HAS worked in ANY department on campus during the last six months AND their personal status, banking information, etc. has changed, the above forms will have to be resubmitted. Personal information is only kept on record for six months for all employees. The employee will be responsible for completing the necessary Tax Forms for the basic deductions if they chose to do so. This can be done in the Payroll Department, 403 Administration Building.
- TYPE OF APPOINTMENT:** The type of work required to be done will determine the classification. You can chose from ONE of the Standard Student "Sofa" Positions **OR** the Non-Employment categories. Each has a brief description and rules attached to help make your selection.
- APPOINTMENT INFORMATION:** The start date of any appointment must begin on a Monday and end on a Friday. The total hourly rate should include 6% vacation pay. All appointments must end **NO LATER THAN** the last Friday before Labour Day Weekend or sooner. Please note that appointment period may be subject to statutory pay.
- SCHEDULE INFORMATION:** All "Sofa" positions will be set up as hourly paid appointments and can have a regular work schedule. This will eliminate the weekly submission of hours. When selecting this option, you must ensure that your schedule does not conflict with any other schedule the employee may have on campus. Conflicts will result in non-payment of hours and delaying the payment process. Or you can chose to submit a time sheet every Thursday by 3:00 p.m. (unless otherwise posted or e-mailed) where the employee works variable hours (actual time and hours are recorded on the time sheet). Again, conflicts with other schedules will result in nonpayment of hours, delaying the payment process. The Non-Employment category employees will be paid on a biweekly basis - no submission of hours is required. However, this is a very strict category. Please ensure that you have made the correct position choice.
- SOURCE(S) OF FUNDING:** A grant number and a total appointment commitment amount are required for budgetary purposes. The commitment must include 6% vacation pay (see #4). Keep in mind that approximately 10% will be added to the commitment for pay levy and staff benefits.
- Once the necessary information is processed, a signed and dated copy of the "Appointment Set-Up Form" will be returned to you for your records.

NOTE: Please keep the below in mind when making a position decision. All appointments must end **NO LATER THAN** the last Friday before Labour Day Weekend or sooner.

FT - Student Research Assistant

- 20 hours per week during regular session; 40 hours per week during the summer
- eight hour per day maximum; over eight hours subject to overtime at 1.5 times per hour hourly appointment forms must be accompanied by a Confirmation

PT - Student Research Assistant

- 40 hours per week throughout the year
- eight hour per day maximum; over eight hours subject to overtime at 1.5 times per hourly rate
- hourly appointment form must be accompanied by a Confirmation

FT - Excluded Classification

- 20 hours per week during regular session; 40 hours per week during the summer
- eight hour per day maximum; over eight hours subject to overtime at 1.5 times per hour

PT - Excluded Classifications (non-students)

- NOT APPLICABLE
- seven hour per day maximum; over seven hours subject to overtime at 2 times per hourly rate
- must be hired as A.E.S.E.S., following the six month rule or post if for longer duration



STANDARD STUDENT “SOFA” POSITIONS

(Please select one)

(revised May 7, 2009)

Standard Job Title	Compensation Group	Range of Hours Allowable	Criteria
Student Office Assistant	Excluded Students	0-20 during academic year; 0-40 during summer	Full-time student whose position profile indicates he/she is doing the following type of duties: <ul style="list-style-type: none">• Data entry• Filing• Answering phones, reception• Word processing• Opening, distributing mail• Preparing routine correspondence• Routine bookkeeping• Sorting, processing, verifying forms, registrations, applications, and other documents (Such positions will have a NOC of 1411 – General Office Clerks.)
Student Technician	Excluded Students	0-20 during academic year; 0-40 during summer	Full-time student whose position profile indicates he/she is doing the following type of duties: <ul style="list-style-type: none">• Conduct and assist in laboratory research• Assist in animal care related to laboratory research• Set up, clean, maintain equipment• Conduct routine tests and analysis• Gather data• Collect samples, eg in a field (Such positions will have a NOC of 2221 – biological technician.)
Student Research Assistant	Other Academic	0-40	Normally a full-time student. Professor must submit the Confirmation for Student Research Assistant form to confirm the student is assisting a professor in academic research relating to the student’s discipline. Duties can include assisting in: <ul style="list-style-type: none">• Conducting literature review• Conducting surveys• Conducting laboratory experiments• Data entry• Compiling and analyzing research results (Such positions will have a NOC of 4122 – Postsecondary teaching and research assistants.)



ASSISTANCE TYPES

(revised May 7, 2009)

This document provides definitions of the different types of payments to students and staff relating to scholarships, fellowships, bursaries, research grants and trustee payments. Such payments are considered **NOT** to be employment income subject to Provincial and Federal deductions regulations. To distinguish between such non-employment income and employment income, this document also provides examples of certain employment income appointments for reference.

Please be aware that incorrect interpretations of the definitions and improper use of the appointment form can cause serious problems for the payee, the University and for the department head or grantee who approves the form. If you are unsure whether a grant should be considered for the purpose of research or for the purpose of the recipient's education and training, please contact your Budgets and Grants accountant.

Scholarships and Bursaries (eg. Studentships)

Scholarships and bursaries are amounts paid or benefits given to students who are working towards a degree, diploma, or other certificate of graduation, to enable them to continue their education. A student is not expected to do specific work for the payer in exchange for a scholarship or bursary. Such payments are considered to be non taxable under current CRA guide-lines.

Fellowships for education purposes (eg. Psychology award)

Fellowships for education purposes are similar to scholarships and bursaries. They are amounts paid or benefits given to persons to enable them to pursue their education. The recipient is generally a graduate student and the payer is generally a university, charitable organization, or similar body. Such payments are considered to be non taxable under current CRA guide-lines.

In some cases, a condition of receiving the fellowship may be that the recipient agrees to do some work in exchange for remuneration from the payer (for example, teach, mark examination papers, demonstrate work, or do research as a member of the staff of the university). When paid as part of a fellowship, any such work performed is considered remuneration for service. This remunerative portion of the fellowship should **not** be reported under this category on the Scholarships, Fellowships, Bursaries, Research Grants and Trustee Payment form. Instead, it should be processed using the appropriate HR appointment form, and such payments are taxable under current CRA guide-lines. Source deductions such as taxes, CPP and EI are taken at the time of payment.

Remuneration from research grant (to Researcher or Co-Researcher) (eg. Non student status)

A research grant is generally a sum of money given to enable the grantee to pay expenses necessary to carry out a research project. Research involves a critical or scientific inquiry aimed at the discovery of new facts, or the development of new interpretations of applications. Research does not include research carried out for the sake of *learning how to* conduct research (for example, research carried out by Student Research Assistants). Remuneration from a research grant can be paid to either a researcher or a co-researcher:

- **Remuneration to researcher:** The grant recipient receives direct remuneration from the grant. The funds are paid to the recipient and are available for the researcher's personal benefit.
- **Remuneration to co-researcher:** The researcher engages a co-researcher (who must be either a faculty member or a research associate). The funds are paid to the co-researcher and are available for the co-researcher's personal benefit.

Research grant for research purposes (eg. Student Status)

If the primary purpose of a fellowship is to carry out research for its own sake, the award is considered Remuneration from **Research grant for Research Purposes**, even if the recipient's education and training is also furthered by such research as an inevitable but incidental benefit. Such payments are considered to be taxable to the individual under current CRA guide-lines. However, deductions are not taken at the time of payment. If the recipient chooses to increase tax deduction through Payroll, he/she should be advised to submit a TD1 to Payroll.