

# Job Requisition System

## for Grad Student Research Assistant Payments

Front-End Training Guide



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## Logging in to the Job Requisition System

Log in to Carleton Central at [central.carleton.ca](http://central.carleton.ca). If you have difficulty logging in, please reach out to the ITS help desk for assistance.

Once logged in, select “Human Resources Admin” in the top toolbar. From there, you will be able to select “Casual Job Requisition”.



## Job Requisition Workflow

The Job Requisition process follows a specific workflow. Each time a requisition is sent back for correction, it will return to the beginning of the chain and make its way back through each layer of approval.

The workflow is as follows:

1. **Originator:** This individual starts the Job Requisition process. Each time a requisition is returned for correction, it will go back to the originator. The following employees can be originators:
  - a. Departmental Administrator without Signing Authority
  - b. Departmental Administrator with Signing Authority
  - c. Grant Holder
2. **Grant Holder:** The grant holder approves the requisition outlined by the departmental administrator. This step is only required if the originator is a departmental administrator without signing authority.
3. **Research Financial Services:** Research Financial Services approves that there are sufficient funds in the research fund to pay the employee.
4. **Graduate Student:** The employee will review and accept Type B Research Assistant requisitions. They will also be notified when a Type A requisition have been sent to Student Accounts Receivable (SAR) to be loaded to the student’s account.
5. **Payroll Services:** Payroll Services loads Type B Requisition payments into the payroll system to be paid.
6. **Student Accounts Receivable:** Type A Requisitions are loaded into the student account after approvals are complete. Questions regarding requisitions at ‘loaded to SAR’ status should be directed to [student\\_accounts@carleton.ca](mailto:student_accounts@carleton.ca).

At each step in the workflow, e-mail notifications will be sent to notify the next person of their required action.

## How to Create a Requisition

The originator is responsible for starting the Job Requisition process. Once you have logged in to the system, you will select “Create Job Requisition” at the bottom of the Job Requisition Launch Page.

### Graduate Research Job Requisition Launch Page

#### Welcome to the Graduate Research Job Requisition System.

This tool will help you create and track online job requisitions for your department. The job requisition will flow through the system for approvals, including the acceptance by the employee and submission to HR for payment.

The job requisition does not replace the offer letter.

#### How to Create a Requisition

To create a new requisition select the “Create Job Requisition” button at the bottom of the screen. You will need to provide the following information to complete the job requisition:

- Candidate ID
- Financial information (FOAP)
- Job Type
- Total Hours
- Hourly Rate
- Start and End Dates

To submit the requisition, save changes and add your final comments before clicking the submit button.

#### How to Approve a Requisition

- Set your requisition status to “My Pending”.
- Choose the requisition you want to approve by selecting the “Payment and Approval” button.
- Reverse the requisition for financial information (FOAP), hourly rate, job type, total hours, and start and end dates.
- You have the option to approve, submit for changes, or cancel. Please be sure to provide any pertinent comments.

#### Requisition Status Options

- Saved - not yet been submitted for approval.
- My Pending - requires approval before they can proceed.
- In Progress - outstanding job requisitions.
- Cancelled - you cannot restart a cancelled job requisition.
- Return for Correction - job submitter must make changes.
- Financial Approval Complete - Department Head/Grant Holder and Research Accounting approved payment.
- Complete - employee accepted job.
- Processed by Payroll - payment loaded into Payroll System. Further changes must be submitted to Payroll Services.

Choose Requisition Status:  Fiscal Year:

Requisition	Employee ID	Employee Name	Job Title	Account Index	Warnings	Amount	Begin Date	End Date	Status	Current Approver	Action
No data available in table											

Showing 0 to 0 of 0 entries



## Assign Job

To create the Research Assistant (RA) job requisition, you will need the following information about the student:

- Start and end dates of employment
- Employee ID/student number of RA recipient
- Funding source for the payment
- Job Type



## Assign Job

### How to assign an employee to a job

- Enter the employee ID
- Select the research account
- Select job type
- Select "Save" and the option to proceed to the next screen will be available
- Click on "Next Steps: Payment Details" to continue
- Note: use "Return to List" to go back to the list of requisitions

### Type A versus Type B Payments

- A Type A stipend is a fixed payment made to an individual registered in a graduate program. The individual shall be actively involved in the research of a faculty member in their related area of studies. It is not paid in exchange for quantifiable work performed nor for financial gain. There are no deductions at the time of payment, and the individual will receive a T4A for the amount paid during the calendar year.
- A Type B salary is paid when an employee/employer relationship exists and a quantifiable amount of work has been performed. Salary payments are subject to mandatory source deductions and will include 4% vacation pay, this type of income will receive a T4 denoting the total amount of employment earnings paid during the calendar year.

### Please note - new employees

New employees must have an assigned 9-digit Carleton ID before they can be setup with a job. If you require an ID for a new employee contact Human Resources at (613) 520-3634 or [humanresources@carleton.ca](mailto:humanresources@carleton.ca). You will need to provide the employee's full name, permanent address, SIN, date of birth, gender, and email address.

### RETURN TO LIST

Begin Date (YYYY/MM/DD)

End Date (YYYY/MM/DD)

Who is being hired?

Candidate ID

Please choose the primary Research Account responsible for the job:

1. Will the RA recipient have primary responsibility for how the research is designed, executed and reported?

Yes - The Grant Holder will primarily provide guidance or mentorship.

No - The Grant Holder will have primary control over all aspects of the research and the recipient will work largely under his/her direction.

2. Is the recipient intended to receive the full amount of the payment regardless of the hours worked or any delivered results?

Yes - The primary purpose of the payment is to further the education and training of the recipient.

No - The payment is compensation for assistance on a research project and the recipient is accountable for the hours and/or work.

## Job Types:

- A Type A or Type B research payment will be automatically determined by the system based on your answers to the two yes or no questions on the page.
- **Type A:** A Type A stipend is a fixed payment made to an individual registered in a graduate program. The individual shall be actively involved in the research of a faculty member in their related area of studies. It is not paid in exchange for quantifiable work performed, nor for financial gain. There are no deductions at the time of payment, and the individual will receive a T4A for the amount paid during the calendar year.
- **Type B:** A Type B salary is paid when an employee/employer relationship exists and a quantifiable amount of work has been performed. Salary payments are subject to mandatory source deductions and will include 4% vacation pay, this type of income will receive a T4 denoting the total amount of employment earnings paid during the calendar year.

## Important Notes About Dates

- The start and end dates on your requisition must be within the same term (i.e. for Fall term, dates should be between September and December)
- Only graduate students that are registered for the term specified by the begin and end dates of the job are eligible for payments using this system. If the RA recipient is not registered as a graduate student during the term of payment, you will receive the error message below and will not be allowed to proceed.

Begin Date (YYYY/MM/DD)

End Date (YYYY/MM/DD)

Who is being hired?

Candidate ID

**Candidate is not a registered grad student as of the begin date you entered. Please enter a new date or new student.**

At any time, you may also choose to "Delete Job Requisition". You are not able to retrieve a deleted requisition.

Each time that you save changes you have made, look for the message, “Your changes were saved successfully.” at the top of your page.

Assign Job

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✔ Your changes were saved successfully. ←

**How to assign an employee to a job**

- Enter the employee ID
- Select the research account
- Select job type
- Select “Save” and the option to proceed to the next screen will be available
- Click on “Next Steps: Payment Details” to continue
- Note: use “Return to List” to go back to the list of requisitions

**Type A versus Type B Payments**

- A Type A stipend is a fixed payment made to an individual registered in a graduate program. The individual shall be actively involved in the research of a faculty member in their related area of studies. It is not paid in exchange for quantifiable work performed nor for financial gain. There are no deductions at the time of payment, and the individual will receive a T4A for the amount paid during the calendar year.
- A Type B salary is paid when an employee/employer relationship exists and a quantifiable amount of work has been performed. Salary payments are subject to mandatory source deductions and will include 4% vacation pay; this type of income will receive a T4 denoting the total amount of employment earnings paid during the calendar year.

**Please note - new employees**

New employees must have an assigned 9-digit Carleton ID before they can be setup with a job. If you require an ID for a new employee contact Human Resources at (613) 320-3634 or [humanresources@carleton.ca](mailto:humanresources@carleton.ca). You will need to provide the employee's full name, permanent address, SIN, date of birth, gender, and email address.

[RETURN TO LIST](#)

Requisition Number: 4964 (Type 7--Res. Asst. Type A)

Begin Date (YYYY/MM/DD)

End Date (YYYY/MM/DD)

Who is being hired?  
Candidate ID

Please choose the primary Research Account responsible for the job:

1. Will the RA recipient have primary responsibility for how the research is designed, executed and reported?  
 Yes - The Grant Holder will primarily provide guidance or mentorship.  
 No - The Grant holder will have primary control over all aspects of the research and the recipient will work largely under his/her direction.

2. Is the recipient intended to receive the full amount of the payment regardless of the hours worked or any delivered results?  
 Yes - The primary purpose of the payment is to further the education and training of the recipient.  
 No - The payment is compensation for assistance on a research project and the recipient is accountable for the hours and/or work.

[Save](#) [Order Job Requisition](#)

Next Step: **PAYMENT DETAILS** ←

Once you have saved, you will see the “**Next Step: PAYMENT DETAILS**” option appear at the bottom of the screen. Click here to proceed to enter the job payment details.

## Grad Job Payment Page

### Type A Payment

If the system determines the payment to be of Type A, you will be able to enter the:

- Begin and end dates
- Total amount due to the employee (which will be allocated over the period you’ve outlined)
- Financial details

This payment will be loaded to the student’s account once all approvals are complete.

## Grad Job Payment Page

### Setting up Job Payment

- Enter the payment and financial details below
- Click "Save Payment Information" to save
- To submit for approval, enter comments (optional) and click "Submit Decision".

**Reduce Source Deductions - RA - Type B Payments only** - If you select the "reduce source deductions" checkbox, the system will calculate the statutory deductions and reduce the payment amount accordingly. This payment may be adjusted by Payroll Services if statutory deduction maximums have been met. Note: Minimum wage is currently \$14/hour. If you want to reduce payment by employer source deductions the pre-reduced hourly rate is \$16.

### Financial Approvers

- Review the information below
- Select your approval decision from the dropdown menu
- Enter comment (optional) and click on "Submit Decision" to proceed.


Click "Return to List" to go back to the previous page.

[RETURN TO LIST](#)

Requisition Number: 4964  
 Department: 000-Non-CJ Organization  
 Position: 005000-Research Assistant - Type A  
 Candidate:


Begin Date (YYYY/MM/DD)

End Date (YYYY/MM/DD)

Total Amount Due:  

### Financial Details

Index	Grant Holder	Fund Code	Organization Code	Account Code	Program Code	Activity Code	Percent	
				612001-Canadian Masters Research Salary	1100		100	Delete

[Add Source of Funding](#) 

[Save Payment Information](#) [Delete Job Requisition](#)

## Type B Payment

If the system determines the payment to be of Type B, you will be able to enter the:

- Begin and end dates
- Hourly rate
- Total hours
- Whether or not you would like the total amount to include source deductions
- Total amount due: for Type B payments, the total amount due will be populated based on the hourly rate, the total hours, and source deduction checkbox
- Financial details

## Grad Job Payment Page

### Setting up Job Payment

- Enter the payment and financial details below
- Click "Save Payment Information" to save
- To submit for approval, enter comments (optional) and click "Submit Decision".

**Reduce Source Deductions - RA - Type B Payments only** - If you select the "reduce source deductions" checkbox, the system will calculate the statutory deductions and reduce the payment amount accordingly. This payment may be adjusted by Payroll Services if statutory deduction maximums have been met. Note: Minimum wage is currently \$14/hour. If you want to reduce payment by employer source deductions the pre-reduced hourly rate is \$16.

### Financial Approvers

- Review the information below
- Select your approval decision from the dropdown menu
- Enter comment (optional) and click on "Submit Decision" to proceed.

Click "Return to List" to go back to the previous page.

[RETURN TO LIST](#)

Requisition Number: 4964  
 Department: 000-Non-CJ Organization  
 Position: 015000-Research Assistant - Type B  
 Candidate:


Begin Date (YYYY/MM/DD)

End Date (YYYY/MM/DD)

Hourly Rate:

Total Hours:

Total Amount Due:

Payment to include Employer Source Deductions?  

### Financial Details

Index	Grant Holder	Fund Code	Organization Code	Account Code	Program Code	Activity Code	Percent	
				612001-Canadian Masters Research Salary	1100		100	Delete

[Add Source of Funding](#)

[Save Payment Information](#) [Delete Job Requisition](#)

If you select the box titled “Payment to include Employer Source Deductions?” 14% will be deducted from the Total Amount Due to your employee. This will cover the Employer portion of their source deductions. If you do not select this box, the full amount will be issued, minus taxes. You will immediately see the total amount and hourly rate change when you select this item.

<b>Begin Date (YYYY/MM/DD)</b>	<input type="text" value="2018/03/01"/>	<b>Begin Date (YYYY/MM/DD)</b>	<input type="text" value="2018/03/01"/>
<b>End Date (YYYY/MM/DD)</b>	<input type="text" value="2018/03/31"/>	<b>End Date (YYYY/MM/DD)</b>	<input type="text" value="2018/03/31"/>
<b>Hourly Rate:</b>	<input type="text" value="20.00"/>	<b>Hourly Rate:</b>	<input type="text" value="17.54"/>
<b>Total Hours:</b>	<input type="text" value="20.00"/>	<b>Total Hours:</b>	<input type="text" value="20.00"/>
<b>Total Amount Due:</b>	<input type="text" value="400"/>	<b>Total Amount Due:</b>	<input type="text" value="350.8"/>
<b>Payment to include Employer Source Deductions?</b>	<input type="checkbox"/>	<b>Payment to include Employer Source Deductions?</b>	<input checked="" type="checkbox"/>

### Financial Details

When setting up the Financial Details, you are able to tailor the FOAP information using the drop down menus. The index you select will automatically update your Fund, Org, and Program. The Account is automatically selected based on the student’s level of study and residency status. Next to the Index, you will see the name of the Grant Holder responsible for the selected fund.

If you would like to use more than one Fund, select “Add Source of Funding” and set up the additional FOAP. You can use up to a total of five different Funds. Please ensure that the “Percent” is allocated between the jobs and that it totals 100%.

**If the Funds are owned by separate approvers or you would like funds to be spent sequentially, please create separate requisitions.**

If you are not finished creating your requisition and you would like to leave the page, click “Save Payment Information”. This will save the changes you have made without sending the requisition on for further approval.

### Submitting for Approval


Once you have set up your Type A or Type B job, you will be able to scroll down and submit the requisition. You can also include comments for the next approver at this time.

When you have reviewed the information, select “Submit”.

Once you have saved the Job Payment details, enter any comments and click "Submit" to send the Job Requisition to the next approver.

Decision Details						
Date	Approver	Proxy	Role	Decision	Comments	
No data available in table						

Comments:





## Requisition Status

On the Job Requisition Launch Page, you will be able to view any job requisitions that require your attention and check the status of any requisition that you have submitted. The requisition status includes the following options:

- All – View all requisitions (recommended)
- Saved – not yet been submitted for approval
- My Pending – requires approval before they can proceed
- In Progress – outstanding job requisition
- Cancelled – you cannot restart a cancelled job requisition
- Return for Correction – job submitter must make changes
- Financial Approval Completed – Department Head/Grant Holder and Research Accounting approved payment. Awaiting student sign-off
- Loaded to SAR. A Type A requisition has been approved by all financial approvers and has been sent to Student Accounts Receivable (SAR) to load to the student's account.
- Complete – employee accepted job.
- Processed by Payroll – payment loaded into Payroll System. Further changes must be submitted to Payroll Services.

Any jobs that are pending approval will appear in a list on the Launch Page. Once you have submitted your requisition, it is pending the next approver.

If you need to make any changes, you can 'return for correction' at any time before payroll or SAR has processed the requisition (status 'Processed by Payroll' or 'Loaded to SAR'). After that point you will need to contact them either [SAR](#) or [Payroll Services](#) for assistance.

## Review Job Payments

By selecting a requisition's 'Payment and Approval' button, you can view the financial details and make changes as needed.

Once the payment has been reviewed, you can make one of three selections:

- Approved – the payment will move on to Research Financial Services.
- Cancelled – This will delete the job requisition. A deleted job cannot be retrieved.
- Returned for Correction – the requisition is sent back to the initiator for correction. In this case, comments should be made for clarification.

Once approved, the system performs a series of checks to determine where to send the requisition next. If there are any number of issues or errors, the requisition moves to Research Financial Services for validation of funds. If there are no issues or errors, the requisition moves to the candidate for approval.

If you need to make any changes, you have the ability to 'return for correction' at any time before payroll has processed the requisition. After that, please contact payroll services directly.

## Cancelling a Job

If you need to cancel a position that has made it through the approval process and has been accepted by the employee, please contact HR at [humanresources@carleton.ca](mailto:humanresources@carleton.ca) to arrange to have the position terminated.

## E-mail Notifications

Each time the requisition is sent on for approval, the recipient will receive an e-mail letting them know that they have a job to approve, the timelines to approve the job and contact details.

## Fund Access

Fund access is granted through the Finance Access and Authority Management Tool in [Carleton Central](#). For more information about this tool see the [FAAM Tools and Support](#) website.

## Contact Information

For assistance with the system please contact [humanresources@carleton.ca](mailto:humanresources@carleton.ca).