Getting Documented

If you have never worked for the university before, you will be prompted to complete the documentation process before you are able to accept your job offer.

Within the Human Resources Services tab, you will find the following forms that are required to be set up as an employee: the Confidentially Agreement, the Mandatory Training Agreement, your Direct Deposit Details, Biographical Information, your TD1 and TD1 ON forms, and finally your Job Offers.

To begin the documentation process, select ‘Confidentiality Agreement’. Here you will be prompted to read the agreement and to proceed you need to select ‘I agree’ and ‘Submit changes’.

Next, you will note the mandatory training that is required. This can all be found on Carleton Central once you’ve been set up as an employee and you are required to complete it to work for the university. Select ‘I Agree’ and ‘Submit Changes’ when you’re finished.

Here you will put in your direct deposit information. You will include your transit number, financial institution number, and the account number. This sample of a cheque will show you where the numbers can be found on a basic cheque. When you finish submitting your numbers, select ‘Submit Changes’.

On the biographical information page, you’ll confirm your Banner ID, your name, your date of birth, and you will type in your SIN. If any of this information is incorrect, please contact Human Resources. You can call them at this number here (613-520-2600 x3634) or email them at humanresources@carleton.ca. You will also be prompted to select your citizenship. If you select anything besides ‘Canadian’ resident, whether it’s Landed/Permanent Resident, Student Visa or Other Visa, you will be given a drop-down with a Country of Citizenship option. Here, you can select the country that you are visiting from. When you are happy with your changes, select ‘Submit Changes’.

Your next step will be providing your tax information by filling out your TD1 and TD1 ON form. Select the first form to proceed. Here you’ll be required to read each section thoroughly and provide your information as required. There’s a section for your basic information and then a section for claim amounts that apply to you. If you need assistance, you can visit our FAQ page or you can contact the Canada Revenue Agency for more information. Once you’ve gone through and read all the information and filled it out accordingly, you can select ‘I accept’.

Once you’ve saved your changes, please look for the message ‘Your changes have been submitted’ at the top of your page. When you’re done, you can scroll down and select ‘Set Up TD1’ to return to the TD1 menu. Now, you’re ready to move on to your TD1 ON form.

Here, again, you will read through all the information and fill it out accordingly. When you’re finished, select ‘I accept’. Again, look for the ‘Your changes have been submitted’ message. At this point in time, you’re ready to select ‘Review Job’. You’ll see in green here ‘All required information has been entered’. This means you’re ready to accept your job.

For more information, please view one of our other tutorials. If you have any questions, contact Human Resources at humanresources@carleton.ca