

GENERAL INFORMATION

1. Preparation of forms involving leave without salary and separation and the immediate notification of Payroll by phone so that payments can be stopped. This should be done even if you expect the form to be timely.
2. Leaves without salary for durations of less than a month can be accomplished by substitute days on a Time Report Form. Leaves of a month or more should be processed on a PDR.
3. Checks to be cancelled should be returned immediately to Payroll. This will ensure immediate updating of employees' year-to-date earnings and deductions, and correct tax and benefits reporting.
4. Most payroll questions and problems should be handled between the department and Payroll, not the employee and Payroll.
5. Departments should check to be sure W4 forms are correctly filled out by students claiming exempt status. The word "exempt" should be indicated on line 7 of the W4. Please note whenever exempt is claimed, line 5 (Allowances) must be blank.
6. Inform employees that departmental Payroll representatives and Payroll Services personnel are not tax consultants and cannot advise them on the number of exemptions they should claim.
7. Extension numbers of preparer of PAF or PDR should always be shown on the form. Whenever possible, in large departments especially, more than one person should be knowledgeable in the handling of payroll forms.

8. Departmental Payroll representatives should review the turn-around PDR distributed by Payroll Services to ensure that any personnel action changes to employees are indicated on the new PDR (the changed data will be underlined.) If a discrepancy is noted inform EDC immediately. Always check anniversary codes on the C1 line of the PDR.
9. Authorization of PAFs and PDRs is generally limited to deans, directors, department heads or their designees. Documents authorizing individuals to approve PAFs and PDRs should be directed to the Payroll Control Unit along with a sample of the authorized signature. The document should specify exactly what the individual is authorized to sign i.e. PAFs only, PDRs only, Time Reports only or all forms. Individuals may not sign their own form.
10. PAFs and PDRs funded by grant and contract accounts require position numbers. Inquiries concerning appropriate numbers should be directed to the Division of Grant and Contract Accounting.