The past year has undergone significant changes around graduate student pay and now there are more to come! Please refer to the attached email sent out by Dr. Doug Welch, Acting Associate V.P. and Dean of The School of Graduate Studies, on Monday, July 18th.

We have prepared this document with the intent of outlining some of the changes and explaining the expected outcomes and impacts of those changes to both the department and student. It is different from last year, so we ask you to please read through.

The payments to Graduate Students for the 2016-17 academic year must be entered on the "Financial Support Database". This database is used for various purposes by many individuals within the School of Graduate Studies. The information is required to pay returning graduate students or students who are expected to begin graduate school in September and it will be extracted from this database.

You can access the financial database by going to:

http://sgs-admission.mcmaster.ca/sgslogin/Login.aspx

Only students for whom you have populated funding information in the "Financial Support Database" section of the database will be transferred to Mosaic. If you are not paying a student DO NOT populate any of the fields.

Timeline: The "Financial Support Database" will be open as of Wednesday, July 20th.

You must enter the chartfield information for all sources of funding (operating, trust and research) into the financial database by 9:00 a.m. on Friday, August 26, 2016. All back up must be submitted to the appropriate Research Finance office by this date. This information will be needed to ensure the data and tables between Finance, HR and Campus Solutions are set up correctly. This is a manual process, which is why the team needs extra days to process this.

It is your responsibility to ensure that all information for new and returning students is submitted on time. If you have any questions regarding the database, or if any of your students are missing from the list, please contact Lorna Thomas via e-mail at gradpay@mcmaster.ca.

Just a reminder that a student will only get paid if they have registered and have at least one placeholder course on each term. If the student is fully registered by 9 a.m. on Tuesday, August 30th, they will receive a payment by Friday, September 16th.

NOTE: All TA/RA in lieu payments are now handled by the HR Service Centre. For the 2016-2017 Academic Year the payments for September 2016 should be entered into the Financial Database. Any questions pertaining to these payments must be directed to hrservicecentre@mcmaster.ca.
Folks,

I am writing to introduce you to the new and much simpler model for graduate support payments that will be in place beginning this September. The model has these features:

- Tuition is due term-by-term on Sep 1, Jan 1, and May 1.
- Interest on tuition will not begin to be collected prior to the second to last business day of those months.
- Lump sum (whole-term) scholarship payment by mid-Sep, mid-Jan, and mid-May.
- Lump sum (whole-term) research scholarship payment by mid-Sep, mid-Jan, and mid-May.
- Bi-weekly employment payments, as before.
- All money goes out to the student (as opposed to first being applied to the student account).
- Students are *solely* responsible for paying their tuition.
- Emergency advances are still possible in extreme situations (against future TA income).

Example for Fall 2016 (which assumes that a student has TA, research scholarship, and scholarship support):

Sept 1 - Tuition for term is due
Sept 16 - Bank deposit of all "research scholarship" (i.e. grant-sourced support) pay for term
- Bank deposit for first two weeks of TA pay
- Bank deposit of all scholarship pay for the term
Sept 28 - Interest begins to accrue on balance outstanding in student account.
Sept 30 - Bank deposit of second two weeks of TA pay
...

The benefits of this model are many, including:
- Simplicity
- Single actor
- Ease of configuration
- Ease of making changes
- A far less complex set of interactions on student account

The front-loading of research scholarship and scholarship money means that cash-flow issues are essentially eliminated.

**The most significant change from a returning student perspective is that, unlike in previous years, they alone will be responsible for arranging payment of tuition during the first month of each term.**

In addition to the above changes, each student and their grad admin will receive an e-mail in early September outlining the dates on which pay will be received for the academic year and the gross amount in each form of pay. Such a schedule will ensure that everyone understands the profile of their pays for the coming academic year.

Best regards,

Doug

--

Doug Welch
Acting Associate Vice-President and Dean
School of Graduate Studies
The notes below are to help you determine what information is relevant for specific areas of the "Financial Support Database". Please refer to them as you are completing the information on-line.

For all payments other than Major Scholarship, please review the chartfield that is attached to the Funding Name on the SGS Financial Support Database (SGS FDB). If the chartfield(s) is not correct or is missing, please provide the correct information by e-mail to loprest@mcmaster.ca. These chartfields are attached to your "positions" in HR and "item types" in Campus Solutions.

The student number, name, program, degree, term/level, and visa status will automatically populate for each student based on the information that was entered in Campus Solutions. If any of this information is incorrect, please send an email to sgsrec@mcmaster.ca.

1. COPY TO CURRENT
   - For new admissions, the department recommendation has been pre-populated. Select “copy to current” to add these values for payment. Edits are still available. Returning students must be entered with the correct funding name and values for all sources of funding.

2. FUNDING NAME
   - Select the appropriate funding name for the payment you are processing
   - Refer to Appendix B for list of definitions.
   - If you chose "Major Scholarship" under "Funding name" you will be provided with a list of Award Names that you can click on. The "Item Type" and "Chartfield" fields will automatically populate based on what you have chosen.

3. CHARTFIELD
   - This field will automatically populate for all funding payments except for RA in Lieu of TA and Research Scholarship payments. A sample format is shown on the financial database of the required fields.

4. HOURS
   - Hours, including the additional 3 hours of training, must be inputted for TA and RA in Lieu of TA payments as these payments are considered to be employment income. The "Gross Amount" field will be automatically calculated and populated for TA and RA in Lieu of TA payments.
   - Hours are not required for Scholarship payments.

5. GROSS AMOUNT
   - This field will automatically calculate based on the hours that were entered and populate for TA and RA in Lieu of TA payments.
   - You must populate this field for Grad Scholarship, Dept. Scholarship, Research Scholarship, Entrance Scholarship, Tuition Bursary, and UHIP & Fee only payments.
   - This field will populate for certain Major Scholarships i.e. CIHR Master’s, OGS, SSHRC Doctoral, etc., however you must adjust the amount if the student doesn't hold the award for the complete academic year, (i.e. A student’s OGS, QEII or OTS award was effective May 1 of the previous academic year, as of September the student only has 8 months left of the award, therefore the amount must be prorated for the remaining amount of the award (i.e. $10,000.00 for OGS or QEII).

6. PAY TERM
   - You must chose the appropriate pay term from the drop down box
   - employment income (TA and RA in lieu of TA payments) must be paid when the work is being done
   - all scholarship payments will be paid as a lump sum approximately mid-month September, January, May

NOTE:
-Entrance Scholarships are to be paid in the first term of study
-There is no longer a September to August or September to April etc. option. Every payment has to be entered in as an amount payable for each term. You must make sure the amount(s) over the term(s) equal the total amount you want to pay as not all amounts are equally divisible by 2 or 3 – i.e. If a student is paid a major scholarship totaling $15,000 for the academic year, then $5000 should be entered in for each term. If a student is paid a major scholarship totaling $17,500 for the academic year, then $5,833.33 should be entered for 2 of the terms and $5,833.34 should be entered for 1 term – you can't be over or under in total.
-Also note, that if you are paying a newly admitted student, the "copy to current" feature is still available but you must make sure you change the amount to be the amount per term as the total amount will populate.
7. RESEARCH APPROVAL PROCESS
- The appropriate Research Finance Office requires a pay authorization for each student for whom you are paying on a research project.
- You can obtain a completed pay authorization form by selecting "Print Ind. Report for Auth." on the drop down menu under "Report". Refer to Diagram 1 below.
- The faculty member who has signing authority on that chartfield must sign and date the form before you forward it to research finance. **YOU DO NOT HAVE TO FORWARD A COPY TO SGS.**

8. AUDIT REPORT
- Once the Financial Database is closed, please submit a summary report to SGS payroll. This report must be dated and signed by the department administrator. You can obtain a completed summary report by selecting "Print Summary Report" on the drop down menu under “Report”. Refer to Diagram 1 below. SGS payroll requires this report for auditing purposes.

Diagram 1.
TEACHING ASSISTANTSHIP (TA) – Article 13
- Payments to an employee who has been hired according to the terms and conditions of the collective agreement between McMaster University and the Canadian Union of Public Employees (CUPE) Local 3906 Unit 1. These monies MUST be paid when the work is scheduled to be done and are paid via the HR module. These monies are paid biweekly.

RA IN LIEU OF TA - Article 2.01(b)
- Payments to an employee who is eligible for a teaching assistantship under Article 13 and to whom a faculty member, or department, has arranged to assign a specific research project instead. These monies MUST be paid when the work is scheduled to be done and are paid via the HR module. These monies are paid biweekly.

GRAD SCHOLARSHIP
- Funds allocated by The School of Graduate Studies (using chartfield D 10038, P 600xx) to the Faculties (formerly the “9” ledger accounts). These monies are paid as a lump sum per term via the Campus Solutions module.

ENTRANCE SCHOLARSHIP
- Funds allocated to students to be paid in their first term of study as a lump sum via the Campus Solutions module.

DEPARTMENT SCHOLARSHIP
- Funds provided to a student from a department/faculty through their department operating account (Fund 20). These monies are paid as a lump sum per term via the Campus Solutions module.

MAJOR SCHOLARSHIP
- Funds provided for a student through an external agency (i.e. NSERC, SSHRC, OGS, Heart and Stroke, CIHR, etc.) or internal University graduate scholarships (i.e. Hooker Fellowship, etc.). These monies are paid as a lump sum per term via the Campus Solutions module.

TUITION BURSARY
- Funds provided to ANY STUDENT to assist with the cost of Tuition. These monies are paid as a lump sum per term via the Campus Solutions module. Tuition is due at the beginning of each academic term.

UHIP & Fee Only
- Funds provided to ANY STUDENT to assist with the cost of UHIP & supplemental fees. These monies are paid as a lump sum per term via the Campus Solutions module. UHIP and supplemental fees are all due in September.

RESEARCH SCHOLARSHIP
- Funds provided by a faculty member to a student to support the student's research project. These monies are allocated from Funds “55”, “85” and must be approved by the appropriate research finance office. These monies are paid as a lump sum per term via the HR module.

NOTE:
RESEARCH ASSISTANT (RA)
- Payments to an employee for research work. These payments are not included in the collective agreement between McMaster University and the Canadian Union of Public Employees (CUPE) Local 3906 Unit 1. These are temporary contracts that must be processed through HR Services and to be paid on the Graduate payroll. Please indicate on the HR event form in the comment section that this is a full time Graduate student.
EMPLOYMENT INCOME paid to full time graduate students - Monies must be paid when the work is scheduled to be done. Payment in the incorrect term may affect the employee's taxes. These monies consist of Teaching Assistantships, Research Assistantships in lieu of Teaching Assistantships, Sessional Faculty, and Temporary/Casual payments. These monies are paid biweekly.

All employment payments are processed by the HR Service Center and should be emailed to hrservicecentre@mcmaster.ca or mailed to CSB 202. Any questions pertaining to these payments, social insurance numbers, and CUPE Local 3906 (TA and Sessional Faculty) should be directed to HR.

NOTE:
Due to the additional 3 hour per term Health and Safety Training policy all TA payments must be entered in for each term i.e. September to December, January to April, or May to August. Hours per term, including the 3 hours of training, must be entered as the total hours to be paid per term. Neither HR nor SGS will be adding the 3 hours per term.

PERMISSION TO WORK AT MCMASTER – Full time graduate students are expected to limit time spent on employment both inside and outside the University to an average of 10 hours per week. No exceptions totaling more than 505 hours at McMaster in a single academic year (September to August) will be allowed. The “Permission to work” form is no longer used. A “Worked Hours” report has been developed and will be run by SGS on a monthly basis. When a student has reached a certain hour's threshold, the student, program administrator, and hiring department will be notified. A student will have to decide to stop working or continue working but change their student status from full time to part time.
Graduate students will receive two separate payments, depending on the type of funding:

1. Campus Solutions
Graduate, Entrance, Department, Major, Tuition Bursary, and UHIP & Fees only monies are scholarship funds (T4A income). The funds will be paid directly to the student by direct deposit to their bank account. If the student hasn’t entered banking information in Campus Solutions then a cheque will be mailed to the mailing address that is provided in the “Contact Information” section. *These monies are not taxed.* A pay schedule is attached.

2. Human Resources - This is T4 or T4A income.
   - **Research Scholarships** are scholarship funds (T4A income) provided by the supervisor. These monies will be paid as a lump sum per term directly to the student by direct deposit. *These monies are not taxed.*
   - **Employment Income** are employment funds (T4 Income) from work performed on campus. The net amount of these monies are paid biweekly, directly to the employee by direct deposit. *These monies are taxed.* More information about employment payments is provided in this package in Appendix C.

If the student hasn’t provided banking information to the HR Service Center, a cheque will be produced and the student will have to pick up the cheque in HR. A pay schedule is attached.

If there are any changes to a student’s funding that occurs during the year you must notify the student in writing. This will assist them with budgeting and clarify for taxes. A template letter is attached for your use.

**Undergraduate and Non-McMaster Teaching Assistants** are not paid through the SGS Financial Support database. These payments are processed through Human Resource Services. Please contact the HR Service Center via email hrservicecentre@mcmaster.ca or extension 22247.

**Research Scholarships** - It is mandatory that all departments pay Research Scholarships by direct research charges. Please remember that you must get Research Finance approval on these forms **before** you send them to SGS. The following account-codes have been created for payments to Graduate Students:

- 501005 - Masters Can/PR Scholarship
- 501006 - PhD Can/PR Scholarship
- 501009 - Masters Visa Scholarship
- 501010 - PhD Visa Scholarship

**Stop Pays** - You **must** submit a form to stop a student’s pay. This is particularly important as most students opt to be paid by Direct Deposit. *You will be responsible for recovering monies paid to students if you forget to send the paperwork, or fail to send it in a timely fashion.* If you are stopping scholarship payment(s), please submit a Graduate Student Stop Payment and Change of Account form to SGS either via email to gradpay@mcmaster.ca or via mail to GH 212. If you are stopping employment payment(s), please submit a HR Event form to the HR Service Center either via email to hrservicecentre@mcmaster.ca or via mail to CSB 202.

**Thesis Submission** – If a student files their **FINAL** thesis by September 29, 2016 they will be cleared to graduate as of August 31, 2016. Therefore they do not need to register nor does any information need to be entered into the financial database or a payment form sent in. The student will not receive any payment for the September 2016 pay. **If the student does not** anticipate meeting the above deadline then they **MUST** register to receive financial support.
Dear [Student First Name] [Surname]  
[Empl ID]  
This correspondence outlines the changes to your financial support for the 2016/17 academic year (September 2016 – August 2017).  
For the 2016/17 academic year, your total financial support was (total amount). Your total financial support has been changed to (new total amount).  

<table>
<thead>
<tr>
<th>Funding Name</th>
<th>Total Amount</th>
<th>Term 1</th>
<th>Term 2</th>
<th>Term 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Award</td>
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<tr>
<td>Major Award – enter name</td>
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<tr>
<td>Department Scholarship</td>
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<tr>
<td>Graduate Scholarship</td>
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</tr>
<tr>
<td>Tuition Bursary</td>
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<tr>
<td>Research scholarship</td>
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<td></td>
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</tr>
<tr>
<td>TAsip</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RA in Lieu of TA</td>
<td></td>
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</tbody>
</table>

Please let me know if you have any questions or concerns at [insert contact information and office hours].  

Sincerely,  

[insert title. Normally to sent by Department Administrator or Graduate Chair/Assistant Dean]
<table>
<thead>
<tr>
<th>AWARD NAME</th>
<th>CODE</th>
<th>VALUE</th>
<th>PROJECT</th>
<th>PROGRAM</th>
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</thead>
<tbody>
<tr>
<td>CIHR MASTER’S</td>
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<tr>
<td>INTERNATIONAL EXCELLENCE</td>
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<tr>
<td>NSERC AGB - SE DOCTORAL</td>
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<tr>
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<tr>
<td>NSERC AGB - SE MASTERS</td>
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<td>SSHRC CGS MASTER’S (CGSM)</td>
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<td></td>
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<tr>
<td>CIHR CGS DOCTORAL (<strong>See below</strong>)</td>
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<td>VANIER – CIHR</td>
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<td>VANIER – NSERC</td>
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<td>VANIER – SSHRC</td>
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</table>

**NOTE: CIHR DOCTORAL:** There is normally a $5,000 research allowance that will be opened in the student’s name by Research Services. Please review the Authorization For Funding for specific details of the value of the award. Individual accounts will not be created for the CIHR Vanier Doctoral or Master’s awards. This is a change from previous years.
<table>
<thead>
<tr>
<th>TA, RA in lieu of TA, Sessional Faculty Payments, Temp/Casual Payments</th>
<th>All Scholarship Payments</th>
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</thead>
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<tr>
<td>Paid Biweekly</td>
<td>Paid Lump Sum Per Term</td>
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<tr>
<td><strong>September to December</strong></td>
<td><strong>January to April</strong></td>
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<tr>
<td>September 16, 2016</td>
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</tbody>
</table>

*PLEASE NOTE THERE IS NO PAYMENT FOR THE PERIOD OF DECEMBER 18, 2016 TO DECEMBER 31, 2016 (pay date January 6, 2017).

*MCMaster will send these payments to the bank by the above dates. It may take 3 to 5 business days from the above dates before the monies are deposited into the employees bank account.

*PAYMENT FORMS RECEIVED AFTER THE START OF TERM INITIAL CUTOFF DATE WILL BE PROCESSED ON AN INDIVIDUAL BASIS.