UNIVERSITY OF MICHIGAN

Exception Payment to Faculty and Staff



This form should be used to request payments to individuals: 1) who are currently or soon will be a member of the U of M faculty and staff, 2) who have terminated and are owed a lump sum payment , 3) who have a dry appointment, or 4) for whom a check is required for a presentation. Payment types include settlements, new hire bonuses, and retirement contracts. **HRMS M-Pathways Additional Pay Workflow Transactions should be used to make all other payments to current U of M faculty and staff.**

Last Name _____ First _____ Middle _____

UMID # _____ U.S. Social Security # (if UMID # is unknown) _____

Job Title _____

Current mailing/home address: (Enter if payment is to be made prior to date of hire or after termination.)

Number and Street _____

City _____State _____ Zip _____ Country _____

Department Requesting Payment _____

Amount: $_____ Shortcode(s) and percent to be charged: _____ _____

Date(s) of Service: From: _____ To: _____

Description of Payment:

Special Instructions:

Payment Distribution: ○ Direct Deposit, if available ○ Check via U.S. Mail ○ Pick-up check at University Payroll Office

Prepared by: _____ Uniqname _____ Phone _____ Date _____

I certify that the terms, restrictions and qualifications set forth in this form's administration policy are met and that the payments are in compliance with all conditions imposed by the funding source.

_____ _____

Chair/Department Head (name typed) Signature

_____ _____

Dean/Director or Designated Rep (name typed) Signature

_____ _____

Releasing Unit Rep (name typed) Signature

ROUTING INSTRUCTIONS:

- Send this completed and signed form to HRRIS, G250 Wolverine Tower, 1281. Attach copy of agreement, if applicable. Attach a Form I-9 if this payment is for a future hire and a Form I-9 is not on file.

FOR DATA ENTRY USE ONLY

HRRIS: Initials: _____ Date: _____ Regional Campus: Initials: _____ Date: _____

Payroll: Empl Rcd # _____ Earnings Code: _____ Date entered: _____ Initials: _____ Paydate: _____

Instructions for Completing the
Exception Payment to Faculty and Staff Form

Standard Practice Guide(s) for reference:

- SPG 201.85

Related Forms:

- None

Guideline(s) for using this form:

- If the individual currently has an active appointment and is actively being paid, an Additional Pay Workflow Transaction must be created unless a special check is required for a presentation.
- This form should be used prior to date of hire or after termination/retirement if the payment is related to an agreement or contract with the individual. If payment is requested prior to date of hire and a Form I-9 is not on file, a Form I-9 must be attached to this payment request form.
- This form should be used if the individual has an active appointment but is not actively being paid, e.g. leave of absence, short workbreak or dry appointment.

Definition of Fields:

- Name — use legal name, not preferred name
- UMID # — commonly referred to as emplid #
- Amount — If this amount should be the exact amount paid to the individual (i.e. the "net" pay), please indicate in the "Special Instructions" field that you wish the amount to be "grossed-up". For information about "grossing-up payments, see the Payroll web site: http://www.finops.umich.edu/payroll/calculators/award
- Shortcode(s) and percent to be charged — if payment should be charged to more than one shortcode, list all shortcodes and the appropriate percent of the payment.
- Date(s) of Service — payment is not created until after services are complete unless a check is required for presentation.
- Special Instructions — If the individual participates in direct deposit, then direct deposit should be used for this payment. However, in the infrequent event that a check is necessary for a presentation, a check will be available for pick-up at the University Payroll Office if the pick-up date and departmental contact person are included in the "Special Instructions" box.
- Payment Distribution — Choose the appropriate payment distribution from the 3 alternatives listed on the form.
- Releasing Unit Rep (name typed) — If the payment is being made by a unit other than the unit in which the individual is appointed, then a representative from the appointing unit must sign the form.

Attachments and Routing:

- Copy of agreement or contract must be attached, if applicable
- It may be necessary to route this form within your unit or campus differently than the routing instructions on the bottom of the form. For instance, on the Flint campus, this form should be sent to the Flint Human Resources Office, 213 University Pavilion, 1950, rather than HRRIS.

Tax Withholding and Reporting Information:

- Federal, state and local taxes are withheld from this payment. It is reported on the Form W-2, Box 1 at calendar year-end.