
A8.800 Disbursing/Accounts Payable and Payroll

p 1 of 11

A8.883 Student, Casual and Overload Payroll Change Form

1. Purpose

To provide a means of changing information on a non-regular employee's master file record that has been established in the Student, Casual and Overload Payroll Information System (SCOPIS). The SCOPIS system provides the mechanism for the processing of the University's non-regular employee payroll payments.

2. Responsibilities

- a. Each Campus/Department that processes changes to SCOPIS master file records on the Student, Casual and Overload Payroll (SCOPIS) Change Form (UH Form 25), must ensure that the transactions are in accordance with the procedures specified herein and that the record selection data (Social Security Number and Identification Number) are correct.
- b. Fiscal Officers and Program Managers (Approving Authority) who approve Student, Casual and Overload Payroll Change Forms are responsible for compliance with applicable Federal and State laws, rules, regulations, and University policies and procedures.
- c. The Disbursing Office, Payroll Section is responsible for the processing of the SCOPIS Change Form (UH Form 25) through the SCOPIS system.

3. Guidelines

- a. The SCOPIS Change Form (UH Form 25) is designed to provide a means of changing payroll information on an individual's SCOPIS master file record. Once a master file record has been established, the employer or employee may have reason to initiate changes to hourly or monthly pay rates, Federal or State tax exemptions, account codes, active/termination status, etc. The SCOPIS Change Form cannot be used to create a new master record. Master file records are established through the processing of the Overload and Casual Notification of Personnel Action form (UH Form 6) or the Student Employment Work Agreement (SEWA).

b. Information in the "Present Information Section" of the UH Form 25 will identify the master file record upon which the changes are to be executed. Refer to the current SCOPIS Master File Listings (Reports 1500B, 1500D) to obtain current information on master file records.

- 1) All data in this section must be provided and the "Action" block must be completed to indicate the action that is to be initiated.
- 2) Record selection will be based solely upon the Social Security Number and the Identification (ID) Number provided in this section. Always use the current SCOPIS Master File Listings (Reports 1500B, 1500D) or the existing (current) scan sheets to obtain the appropriate ID Number. It is very critical that the Social Security Number and the ID Number be correct as a change to the wrong record will be executed if the wrong SSN/ID Number combination is reflected.

Note: The ID Number is a two-digit number that is computer assigned for each master file record of an individual. The Social Security Number with the ID Number therefore provides a short form of record identification (as compared to the SSN, Account Code, Payroll Number, Warrant Distribution Code).

c. Information in the "New Information Section" will indicate the required data changes (changes to more than one data field are allowed on the same form). Complete only those lines where changes are required by reflecting the new information and circling the item number in Red Ink.

The master file structure is split into two parts, the Master data fields (personal data that applies to an individual) and the Items data fields (other data that is specific to each separate record). An individual employee will therefore have only one Master record but may have a number of Items records dependent on unique combinations of Social Security Number, Account Code, Payroll Number, and Warrant Distribution Code.

- 1) If a change is to be made to a Master Data Field (Item numbers 01-14, excluding item number 10 - FICA Tax, on the UH Form 25), only one active ID Number (does not matter which one) needs to be reflected on the UH Form 25. In these situations, the change will apply to all of the individual's master file records.

FICA Tax (Item number 10) is a modified master data field where the change will only update the FICA code of an individual's master file records with the same Payroll Number.

- 2) If a change is to be made to an Items Data Field (Item numbers 15-25 on the UH Form 25), each active ID Number that the change applies to must be reflected on the UH Form 25. In these situations, the change will affect only those master file records as identified by the ID Numbers that are reflected on the UH Form 25.

Note: A maximum of 4 ID Numbers may be reflected on the UH Form 25 (changes data to 4 separate master file records). This feature is normally used when an individual's pay is split between a number of account codes which required the establishment of separate master file records. Initiate additional UH Form 25 documents if more master file records have to be changed.

- d. Fiscal Officers are required to sign and date the completed form to certify compliance with procedures and verification of the Social Security Number and the ID Number.

4. Detailed Instructions for Completing the SCOPIS Change Form (UH Form 25 - Attachment 1)

Note: Figures in parenthesis next to the title of the fields on these instructions indicate the maximum number of characters allowed for the field. If an asterisk is placed after the number, each space, comma, hyphen, decimal, etc., are to be included in the count.

a. Present Information Section

Refer to the current SCOPIS Master File Listings (Reports 1500B, 1500D) to obtain current information on master file records.

1) Employee Name (22*)

Enter the employee's name as it was originally established on the master file record (should have been consistent with the individual's social security card).

- Enter the Last name first with a comma, followed by the first and middle names. The first three letters of the last name are to be placed in the blocks provided, followed by the rest of the name.
- If a last name is less than three (3) characters,

the comma and space are required to be placed in the character blocks (e.g. H o , or I , _).

2) Department

Enter the appropriate campus or Department (e.g. Agri-Bio Chem, Honolulu CC).

3) Action (1)

Check the appropriate block to indicate whether the record is to be changed or terminated (Only one action may be selected).

- Selection of the "Change" block indicates that changes to data are to be initiated.

- Selection of the "Terminate" block indicates that the master file record is to be terminated (master file record can no longer be used to initiate payments to the employee). If the individual has more than one master file record, only the master file record identified in the "Present Information Section" will be terminated. All other records for that individual will remain active on the master file.

4) Social Security Number (9)

Enter the employee's social security number established on the master file record (should have been consistent with the individual's social security card).

5) Identification (ID) Number (2)

The Identification (ID) Number is a two-digit number that is computer assigned for each master file record of an individual. The Social Security Number with the ID Number therefore provides a short form of record identification (as compared to the SSN, Account Code, Payroll Number, Warrant Distribution Code).

- Enter the appropriate ID Number that identifies the master file record. Always use the current SCOPIS Master File Listings (Reports 1500B, 1500D) or the existing (current) scan sheets to obtain the appropriate ID Number.

- Caution !! Record selection will be based solely upon the Social Security Number and the ID Number provided in this section. It is very critical that the Social Security Number and the ID Number be correct as a change to the wrong record will be

executed if the wrong SSN/ID Number combination is reflected.

- A maximum of 4 ID Numbers may be reflected on the UH Form 25 (changes data to 4 separate master file records). This feature is normally used when an individual's pay is split between a number of account codes which required the establishment of separate master file records.

6) Account Code (14)

Enter the appropriate new FMIS 14 digit payroll hybrid account code (e.g. G-97-021-F-XXX-B-XXX).

- A maximum of 4 account codes may be reflected on the UH Form 25 (changes data to 4 separate master file records).

7) Payroll Number (2)

Check the appropriate block to indicate the payroll number of the master file record.

- Only one payroll number may be selected. The Payroll Numbers identify the following type of appointments:

F1	College Work Study Student Assistant
F2	Casual Appointment
F3	Regular Student Assistant
F4	Overload Appointment

8) Warrant Distribution Code (3)

Enter the warrant distribution code of the master file record.

b. New Information Section

Master Data Fields

If a change is to be made to a Master Data Field (Item numbers 01-14, excluding item number 10 - FICA Tax, on the UH Form 25), only one active ID Number (does not matter which one) needs to be reflected on the UH Form 25. In these situations, the change will apply to all of the individual's master file records. FICA Tax (Item number 10) is a modified master data field where the change will only update the FICA code of an individual's master file records with the same Payroll Number.

1) New Social Security Number (9) - Item 01

If the social security number originally submitted was

in error, enter the employee's correct social security number.

- Attach a photocopy of the individual's social security identification card and new **original** Federal Employee's Withholding Allowance Certificate (Form W-4) and State Employee's Withholding Exemption and Status Certificate (Form HW-4) documents.

2) New Name (22*) - Item 02

If the name originally submitted was in error or if the name is changed due to marriage or other reasons, enter the correct or new name.

- Enter the last name first with a comma, followed by the first name and middle names. The name should be as reflected on the individual's social security card.
- Attach a photocopy of the individual's social security identification card and new **original** Federal Employee's Withholding Allowance Certificate (Form W-4) and State Employee's Withholding Exemption and Status Certificate (Form HW-4) documents.

3) New Address: Street (26*) - Item 03

4) City, State (22*) - Item 04

5) Zip (5) - Item 05

Enter the new address fields. Enter an address where the Employee's Wage and Tax Statement (Form W-2) can be mailed. Do not use a University address.

- Overload appointments (F4) do not require address corrections/changes as it exists under the regular appointment.
- The UH Form 25 for address changes must be submitted by the mid-December payday to ensure processing as W-2 address information is sent to DAGS in the last week of December.

6) Date of Birth (6) - Item 06

Enter the correct date of birth as a 6 digit numeric entry reflecting the month, day, and year (e.g. 01/15/59).

- 7) Sex (1) - Item 07
Check the appropriate block.
- 8) U.S. Citizenship (1) - Item 08
Check the appropriate block.
 - For F2 and F4 appointments, if U.S. Citizenship is "Yes", the VISA field must be blank. If U.S. Citizenship is "No", a valid VISA code must be reflected.
- 9) VISA (4) - Item 09
Enter a valid VISA code. Applies only to F2 and F4 appointments.
 - For F2 and F4 appointments, if U.S. Citizenship is "Yes", the VISA field must be blank. If U.S. Citizenship is "No", a valid VISA code must be reflected.
 - Enter a "#" in the VISA field if it should be blank and data currently exists on the record.
- 10) FICA Tax (1) - Item 10
Enter a valid FICA code. Applies only to F2 and F4 appointments because student assistants, as a class, are exempt from FICA tax (Exempt FICA tax code is computer generated).
- 11) Earned Income Credit (1) - Item 11
For Payroll Office use only.
Employees must submit the Earned Income Credit Advance Payment Certificate (Form W-5) to the Payroll Office where the required UH Form 25 will be initiated.
- 12) Marital Status (1) - Item 12
Check the appropriate block.
 - Attach new **original** Federal Employee's Withholding Allowance Certificate (Form W-4) and State Employee's Withholding Exemption and Status Certificate (Form HW-4) documents.
 - The marital status must be consistent on both the W-4 and the HW-4 documents.
- 13) Federal Tax Exemptions (2) - Item 13
Enter the correct number of exemptions:
e.g. 00 = no exemptions
01 = 1 exemption...etc.

- Attach new **original Federal Employee's Withholding Allowance Certificate** (Form W-4) document.
 - Enter a "99" if the employee is claiming total exemption from Federal Withholding Tax.
- 14) State Tax Exemptions (2) - Item 14
Enter the correct number of exemptions:

e.g. 00 = no exemptions

01 = 1 exemption...etc.

- Attach new original State Employee's Withholding Exemption and Status Certificate (Form HW-4) document.
- An employee cannot claim total exemption from State Withholding Tax until the Employee's Statement Concerning Non-Residence in the State of Hawaii (Form HW-6) is approved by the State Department of Taxation.

Items Data Fields

If a change is to be made to an Items Data Field (Item numbers 15-25 on the UH Form 25), each active ID Number that the change applies to must be reflected on the UH Form 25. In these situations, the change will affect only those master file records as identified by the ID Numbers that are reflected on the UH Form 25.

Note: A maximum of 4 ID Numbers may be reflected on the UH Form 25 (changes data to 4 separate master file records). This feature is normally used when an individual's pay is split between a number of account codes which requires establishment of separate master file records. Initiate additional UH Form 25 documents if more master file records have to be changed.

- 15) Payroll Number (2) - Item 15
Enter the correct payroll number. Changes can be made between F1 and F3 payroll numbers. Changes can be made between F2 and F4 payroll numbers.
- However, F1 and F3 payroll numbers cannot be changed to F2 and F4 payroll numbers or vice versa.
- 16) Warrant Distribution Code (3) - Item 16
Enter a valid warrant distribution code.
- 17) Position Title (30*) - Item 17
Enter the correct position title.

- 18) Hourly Rate (5) - Item 18
Hourly rate should be reflected in dollars and cents format (e.g. 5.00).
- For F1 and F3 appointments, ensure that a corresponding matching entry is entered for Class/Step (Item 25). The Hourly Rate must match the Class/Step on the current Student Assistant Hourly Pay Schedule maintained by the Student Employment Office.
 - If an F2 or F4 record is being changed from an hourly rate of pay to a monthly rate of pay or vice versa, be sure to place zeros "0.00" in the old rate.
- 19) Monthly Rate (7) - Item 19
Monthly rate should be reflected in dollars and cents format (e.g. 1200.00).
- If an F2 or F4 record is being changed from an hourly rate of pay to a monthly rate of pay or vice versa, be sure to place zeros "0.00" in the old rate.
- 20) Account Code (14) - Item 20
Enter the appropriate new FMIS 14 digit payroll hybrid account code (e.g. G-91-021-F-XXX-B-XXX).
- If a change to an account code is made, required Journal Vouchers to transfer incorrect charges will use the UH Form 25 as part of the supporting documentation.
- 21) Appointment Period (12) - Item 21
Enter the correct appointment period as two 6-digit numeric entries reflecting the month, day, and year (e.g. From: 01/15/91 To: 03/15/91).
- 22) College Work Study Ceiling: Summer (4) - Item 22
23) Fall (4) - Item 23
24) Spring (4) - Item 24

CWSP ceilings apply only to CWSP student assistants (F1 payroll). Changes to the ceilings are to be furnished only by the Financial Aids Office.

- If the field is to be changed to reflect no allocation ceiling, a zero (0) is to be indicated.
- New/revised CWSP ceilings reflected in these sections will overlay existing data (i.e. Do not reflect plus or minus adjustments).

25) Class/Step (3) - Item 25

Applies only to student assistants (F1 and F3 payrolls). Enter the correct student assistant Hourly Class/Step or Monthly Class/Step.

- The Hourly Class/Step must be a valid class/step as reflected on the Student Assistant Hourly Pay Schedule maintained by the Student Employment Office.
- The Monthly Class/Step must be a valid class/step as reflected on the Student Assistant Monthly Classification Table maintained by the Student Employment Office.
- If an Hourly Class/Step is involved, ensure that a corresponding matching entry is entered for Hourly Rate (Item 18). The Hourly Rate must match the Class/Step on the current Student Assistant Hourly Rate Table maintained by the Student Employment Office.

c. Authorization Signatures

1) Signature - Approving Authority

Based on internal control requirements, the appropriate approving authority is to sign and date the completed form.

2) Signature - Fiscal Officer

The Fiscal Officer is required to sign and date the completed form to certify compliance with procedures and verification of the Social Security Number and the ID Number.

5. Availability of Forms

Supplies of the Student, Casual and Overload Payroll Change Form (UH Form 25) are available upon request from the Disbursing Office.

STUDENT, CASUAL & OVERLOAD PAYROLL CHANGE FORM

* Important: Correct ID No. is essential.
 Verify with current Master File Listing.

Present Information Section

Employee Name Department _____
Last First Middle

Action	Social Security No.	* ID No.	Account Code	Payroll No.	Warr. Distr. Code
<input type="checkbox"/> Change (C) <input type="checkbox"/> Terminate (T)				Check one: <input type="checkbox"/> F1 <input type="checkbox"/> F3 <input type="checkbox"/> F2 <input type="checkbox"/> F4	

Note: Circle item numbers of items to be changed in Red Ink.

New Information Section

ITEM TO BE CHANGED	ITEM No.	NEW OR CHANGED INFORMATION
Social Security No.**	01	
Name (Last, First, Middle)**	02	22 character Limit
Address: Street	03	26 character Limit
City, State	04	22 character Limit
Zip Code	05	
Date of Birth (MM/DD/YY)	06	
Sex (Check one)	07	<input type="checkbox"/> Male (M) <input type="checkbox"/> Female (F)
U.S. Citizen (Check one)	08	<input type="checkbox"/> U. S. Citizen (Y) <input type="checkbox"/> Non-U. S. Citizen (N)
VISA	09	Applies only to F2 & F4 Payroll
FICA Tax***	10	***FICA Tax changes only affect an individual's master file records with the same payroll number Applies only to F2 & F4 Payroll
Earned Income Credit	11	For Payroll Office Use Only
Marital Status (Check one)**	12	<input type="checkbox"/> Married (M) <input type="checkbox"/> Single (S)
Federal Tax Exemptions**	13	
State Tax Exemptions**	14	
Payroll Number (Check one)	15	<input type="checkbox"/> F1 <input type="checkbox"/> F2 <input type="checkbox"/> F3 <input type="checkbox"/> F4 F1 & F3 cannot be changed to F2 & F4 or vice versa
Warrant Distribution Code	16	
Position Title	17	
Hourly Rate	18	Cumulative Hours since last increase:
Monthly Rate	19	
Account Code	20	
Appointment Period (MM/DD/YY)	21	From: _____ To: _____
College Work Study Ceiling: Summer	22	For Financial Aids Office Use Only
Fall	23	For Financial Aids Office Use Only
Spring	24	For Financial Aids Office Use Only
Class/Step	25	Applies only to F1 & F3 Payroll

General Instructions
 - Reflect 1st three letters of the Employee Name in the blocks before the rest of the name (e.g. Smith, John T.).
 - Changes to items 01 to 14 (excluding item 10 - FICA Tax) require only one active ID No. to be entered on the UH Form 25 to change data on all master file records of an individual. Changes to items 15 to 25 affect each master file record separately.
 - Manoa Campus Only: F1 & F3 - Send to Student Employment Office
 **For changes to these items, attach the original W-4 and/or HW-4. For changes to SS# & Name, also attach copy of valid Social Security card.

 Signature - Approving Authority Date

 Signature - Fiscal Officer Date