

Eligibility Assessment and Approval of Contingent Worker Payment

Introduction

This document provides instruction for eligibility assessment and final approval of a payment to a Contractor via the Contingent Worker Payment eForm in the PeopleSoft HR system. The purpose of this eForm is to gather details about the contract, work, and payment in order to allow for Financial and HR Compliance approval, determination of entitlement eligibilities and, ultimately, payment to the Contractor via HR payment processes.

Further information about Contractor Management can be found at the HR Contractor Management page, located here: <u>https://www.adelaide.edu.au/hr/recruitment/contractor-management</u>

Procedure

This procedure is initiated by notification via email that a payment request has been approved by a financial delegate, and requires eligibility assessment and final approval prior to payment.

Accessing the Form

• Click the Request Reference number link from the email notification to open the form

Hi
A contingent worker payment request has been created that requires your compliance assessment.
Request reference - 199031 Submitted for payment of contractor: Roy Moody Payment description: Language strategy preparation Payment total: 1408
For further information relating to contractor payments, please refer to this site: https://www.adelaide.edu.au/hr/contractors
For further enquiries please contact the HR Service Centre on +61 8 8313 1111 or hrservicecentre@adelaide.edu.au .
Message generated by the Contingent Worker Payment Request eForm.
The University of Adelaide, AUSTRALIA 5005
Note: Please do not reply to this email. This mailbox does not allow incoming messages.

OR

- Log into PeopleSoft HCM: https://hcm.adelaide.edu.au/psp/hcm92prd/?cmd=login&languageCd=ENG
- From the PeopleSoft HCM Home Screen, open the Worklist tile
- Click on the Link for the relevant Work Item, confirming that it's a Contingent Worker Payment

Worklist Items					
From	Date From	Work Item	Worked By Activity	Priority	Link
David Gordon	19/07/2022	Contingent Worker Payment	Notification	~	Zappa, Frank: 1231742
David Gordon	22/07/2022	Contingent Worker Payment	Notification	~	<u>Moody, Roy: 1231741</u>

Contact us

For further support or questions, please contact the HR Service Centre on +61 8 8313 1111 or hrservicecentre@adelaide.edu.au

- OR
 - From the PeopleSoft HCM Home Screen, open the **eForms Homepage** tile



• Click the Evaluate a HR eForm link



• Select Workflow Form Type of CWP then click the Search button

Search Criteria						
eForm ID	begins with	~			1	
Workflow Form Type	begins with	~	CWP		Q	
Workflow Form Status	= ~] [\sim
Empl ID	begins with	~			Q	
Last/Empl Record	begins with	~			Q	
Last Name	begins with	~			Q	
Form Condition	begins with	~			Q	
Case Sensitive						
Search Clear	Basic Se	earc	h 🖾	Save Search Criter	ia	

• If there's a single search result, the form will be shown. If there's more than one search result, choose which one to review and approve by clicking on it

Reviewing the Payment Request

• The **Employee Information** section contains some additional characteristics of the Contingent Worker, which should be reviewed to ensure it's the correct record

Employee Ir	formation		
eForm ID	199008		
Empl ID	1231742	Name	John Smith
ABN	Not Provided	Phone	0401 010 101
Birthdate	21/12/1940	Email Address	john.smith@DISABLED.DISABLED

• The Payment Description section contains a short description of the payment

Payment Description	
Payment Description	Assistance in organisation and documentation of testing results

• The **Contract/Engagement Information** section contains information the overall Contract/Engagement for which the current payment may be the whole payment or only a part

Contract/Engagement Information		
*Are there multiple payments for this Contract / Engagement?	Yes	No
*What is the total value of this Contract / Engagement?		1500

• The **Work Details** section contains information relevant to correct calculation of the payroll tax obligations of the University of Adelaide

Work Details						
	Work Location	Days Worked	Financial Year			
1	South Australia	15	2022-2023			

Payment Details – Account Assignment and Eligibility Assessment

• The **Payment Details** section contains information from the invoice (or other form of payment request) in as much detail as necessary to properly determine the University's tax and superannuation obligations and ensure correct payment to the contractor.

General Ledger Account Assignment

- On the **GL Chartfields** tab, the General Ledger **Account** code for each line will need to be specified
 - o Some Payment Types, such as GST have pre-defined Account values that can't be edited

Invoice /One-Off Payment Details Personalize Find 🔤 🛗 First 🚺 1-2 of 2 🗅 Last							
GL Chartfields Payroll Data							
Payment Type	Amount	Payment Reference	Account	Fund	GL Dept	Campus	Project
1 GST	128.00	751	7277	11	430	00	11105413
2 Labour-Other	1280.00	751		11	430	00	11105413

Obligations / Entitlements Eligibility Assessment

- Click the **Payroll Data** tab
 - The eligibility for each line value must be assessed to determine whether Payroll Tax (PRT) and Superannuation (Super) are applicable
 - Tick the representative boxes to indicate eligibility
 - Super Amount is automatically calculated at the legislated rate of 10.5%, and con be overridden to a higher value if necessary
 - If the Contractor hasn't provided an ABN, and are exempt from the 47% withholding, then the **No ABN Withholding Exemption** box should be ticked, otherwise it should remain unticked

nyment Details								
Invoice /One-Off Payment Details Personalize Find 🔤 🛗 First 🚺 1-2 of 2 🖸 Last								
GL Chartfields Payroll Data								
Payment Type	Amount	Payment Reference	PRT	Super	Super Amount	No ABN Withh	olding Exemption	
1 GST	128.00	751						
2 Labour-Other	1280.00	751			134.40			
Total Amount 1408.00 Total Super Amount 134.40								

Continue Review

- In the **Attachments** section a copy of the invoice (or other form of payment request) should be attached with a copy of the Consulting Services Agreement (CSA) or agreed contract, or any other paperwork that is relevant to this payment
 - If there is no invoice (or other legitimate form of payment request) attached, this payment should not be approved

achm	ients				
ile At	ttachments	NO. 111			
	Upload	View	Description	Doc ID	
1	Upload	View	Invoice 12345	a12300802022-07- 18-15.35.58	lete

Approve or Decline the Request

• If Declining the payment request, make sure to enter a reason into the Comments section

elected Financial Approver	
Financial Approver David Gordon	
	Comments are mandatory when declining the reque
	Approve Decline
Comments	
Your Commont:	
Comment History:	
** Cheryl Fischer	
** Wed, Jul 20 22, 04:25:16 PM Please approve in a hurry	

• Choose the appropriate option on the confirmation window



Confirmation

Upon successful form approval the following screen will be presented, the **Processing** step will be highlighted as the current status of the workflow.



• After a few seconds, clicking the 'refresh' button will update the **Process Visualiser** to show that **System** is highlighted, meaning the payment request has passed the integration stage, and the data is queued for payment during the next pay run.

▼ Form Status		
You have just AUTHORISED th	is form. This action passed the form to the SYSTEM for further processing.	
Process Visualiser		
Process visualiser		
		¢
1: Requestor 2: Finance Approver (1 day 19 hours 34 minutes)	3: Contract Integration System Officer Broker (2 hours 52 minutes)	