



## Employee Information Form

**New Hire Required Documents:**

If you are a new employee please attach direct deposit banking information or VOID cheque, TD1 tax forms (Federal and Provincial), a copy of valid SIN card or SIN confirmation letter and (for Non Residents) Work or Study permit to this form.

| <b>EMPLOYEE INFORMATION – PLEASE PRINT CLEARLY</b>   |   |             |
|--|---|-------------|
| First Name   | Last Name   | Initial     |
| Street Address   |   |             |
| City   | Province  | Postal Code |
| Home Phone #   | Cell Phone #  |             |
| Date of Birth<br><small style="text-align: right;">yyyy-mm-dd</small>  | Age   |             |
| Social Insurance Number  | Are you legally entitled to work in Canada?    Yes <input type="checkbox"/> No <input type="checkbox"/> |             |
| <p><b>New Hires</b> - a copy of your social insurance card is required as a condition of employment. The name that appears on the SIN card/SIN confirmation letter <u>must match</u> the name provided on this form.</p> <p><b>Non Residents</b> – you must provide a copy of your current Valid Work or Study Permit with a copy of your current Valid SIN card/confirmation letter.</p>      |   |             |
| <b>ELECTRONIC PAY STATEMENTS &amp; TAX FORMS (T4's)</b>  |   |             |
| <p>The University issues pay statements only by email. Please provide your email below to ensure you receive your pay statement. You may also elect to receive your T4 electronically, reducing your wait time. Do you agree to receive your T4 electronically?</p> <p><b>I agree</b>    Yes <input type="checkbox"/>    No <input type="checkbox"/></p> <p>Preferred Email Address: _____</p> |   |             |
| <b>EMERGENCY CONTACTS</b>  |   |             |
| Name   | Primary Phone #   |             |
| Relationship   | Cell Phone #  |             |
| Home Address   |   |             |
| Email Address  |   |             |
| Name   | Primary Phone #   |             |
| Relationship   | Cell Phone #  |             |
| Home Address   |   |             |
| Email Address  |   |             |
| Signature  |   | Date        |



## Social Insurance Number (SIN)

### **Employer Responsibilities**

According to Service Canada, employers have the following responsibilities:

- Employers are required by law to request each new employee's SIN **no more than three (3) days** after starting a new job and record their number.
- Employers must ensure employees are correctly identified by requesting pieces of identification before finalizing their employment documents.

### **Employee Responsibilities**

New employees can verify their SIN with Human Resources by:

- Providing a photocopy of their SIN card / SIN Confirmation Letter, or
- Providing a photocopy of the notice of SIN application confirmation, or
- Providing a photocopy of any document issued by Canada Revenue showing the SIN (i.e. Notice of Assessment), or
- Visiting the Human Resources office in person with any of the above items.

Documents should be attached to the employment form, stipend or contract, along with the other required new hire documentation.

Any photocopies of the confirmation of SIN letter or SIN card will be securely destroyed by Human Resources once the information is verified.

### **Name Must Be Current**

By law, when the name of a person to whom a SIN has been assigned changes due to marriage or other circumstances, the person must apply to update their SIN record under the new name within 60 days.

## Study & Work Permits

If the SIN begins with a "9", Human Resources requires a photocopy of the employee's study permit and/or work permit.

These SINs are issued to temporary workers who are neither Canadian citizens nor permanent residents. The SIN record must be updated with Service Canada to ensure the expiry date is valid.

It is the employee's responsibility to ensure the SIN number and permit(s) on file with Human Resources are current.

## Service Canada

Information regarding Social Insurance Numbers can be found on Service Canada's website (<http://www.servicecanada.gc.ca/eng/sc/sin/>) or by calling toll-free 1.800.206.7218 (select option "3").

The closest Service Canada Center is located at Portage Place Mall, main floor.



Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your tax deductions.

Fill out this form based on the best estimate of your circumstances.

|  |                           |  |                             |
|--|---------------------------|--|-----------------------------|
| Last name  | First name and initial(s) | Date of birth (YYYY/MM/DD)                                 | Employee number             |
| Address  | Postal code<br>           | For non-residents only –<br>Country of permanent residence | Social insurance number<br> |
| <p><b>1. Basic personal amount</b> – Every resident of Canada can claim this amount. If your net income from all sources for the year will be \$150,473 or less, enter \$13,229. If your net income will be between \$150,473 and \$214,368 and you want to calculate a partial claim, get Form TD1-WS, Worksheet for the 2020 Personal Tax Credits Return, and fill in the appropriate section. If your net income will be between \$150,473 and \$214,368 and you do not want to calculate a partial claim, or if it will be more than \$214,368, enter \$12,298. If you will have more than one employer or payer at the same time in 2020, see "More than one employer or payer at the same time" on page 2. If you are a non-resident, see "Non-residents" on page 2.</p>   |                           |  |                             |
| <p><b>2. Canada caregiver amount for infirm children under age 18</b> – Either parent (but not both), may claim \$2,273 for each infirm child born in 2003 or later, that resides with both parents throughout the year. If the child does not reside with both parents throughout the year, the parent who is entitled to claim the "Amount for an eligible dependant" on line 8 may also claim the Canada caregiver amount for that same child who is under age 18.</p>  |                           |  |                             |
| <p><b>3. Age amount</b> – If you will be 65 or older on December 31, 2020, and your net income for the year from all sources will be \$38,508 or less, enter \$7,637. If your net income for the year will be between \$38,508 and \$89,422 and you want to calculate a partial claim, get Form TD1-WS, Worksheet for the 2020 Personal Tax Credits Return, and fill in the appropriate section.</p>   |                           |  |                             |
| <p><b>4. Pension income amount</b> – If you will receive regular pension payments from a pension plan or fund (excluding Canada Pension Plan, Quebec Pension Plan, Old Age Security, or Guaranteed Income Supplement payments), enter \$2,000 or your estimated annual pension income, whichever is less.</p>  |                           |  |                             |
| <p><b>5. Tuition (full time and part time)</b> – If you are a student enrolled at a university or college, or an educational institution certified by Employment and Social Development Canada, and you will pay more than \$100 per institution in tuition fees, fill in this section. If you are enrolled full time or part time, enter the total of the tuition fees you will pay.</p>  |                           |  |                             |
| <p><b>6. Disability amount</b> – If you will claim the disability amount on your income tax and benefit return by using Form T2201, Disability Tax Credit Certificate, enter \$8,576.</p>  |                           |  |                             |
| <p><b>7. Spouse or common-law partner amount</b> – If you are supporting your spouse or common-law partner who lives with you and whose net income for the year will be less than Line 1 (Line 1 plus \$2,273 if they are <b>infirm</b>), enter the difference between this amount and their estimated net income for the year. If their net income for the year will be Line 1 or more (Line 1 plus \$2,273 if they are <b>infirm</b>), you cannot claim this amount. In all cases, if their net income for the year will be \$24,361 or less <b>and</b> they are <b>infirm</b>, go to line 9.</p>  |                           |  |                             |
| <p><b>8. Amount for an eligible dependant</b> – If you do not have a spouse or common-law partner and you support a dependent relative who lives with you and whose net income for the year will be less than Line 1 (Line 1 plus \$2,273 if they are <b>infirm</b> and you <b>cannot claim the Canada caregiver amount for children under age 18 for this dependant</b>), enter the difference between this amount and their estimated net income. If their net income for the year will be Line 1 or more (Line 1 plus \$2,273 or more if they are <b>infirm</b>), you cannot claim this amount. In all cases, if their net income for the year will be \$24,361 or less <b>and</b> they are <b>infirm and are age 18 or older</b>, go to line 9.</p>  |                           |  |                             |
| <p><b>9. Canada caregiver amount for eligible dependant or spouse or common-law partner</b> – If, at any time in the year, you support an <b>infirm</b> eligible dependant (aged 18 or older) <b>or</b> an <b>infirm</b> spouse or common-law partner whose net income for the year will be \$24,361 or less, get Form TD1-WS and fill in the appropriate section.</p>   |                           |  |                             |
| <p><b>10. Canada caregiver amount for dependant(s) age 18 or older</b> – If, at any time in the year, you support an <b>infirm</b> dependant age 18 or older (<b>other than the spouse or common-law partner or eligible dependant you claimed an amount for on line 9, or could have claimed an amount for if their net income were under \$14,571</b>) whose net income for the year will be \$17,085 or less, enter \$7,276. If their net income for the year will be between \$17,085 and \$24,361 and you want to calculate a partial claim, get Form TD1-WS and fill in the appropriate section. You can claim this amount for more than one infirm dependant age 18 or older. If you are sharing this amount with another caregiver who supports the same dependant, get the Form TD1-WS and fill in the appropriate section.</p> |                           |  |                             |
| <p><b>11. Amounts transferred from your spouse or common-law partner</b> – If your spouse or common-law partner will not use all of their age amount, pension income amount, tuition amount, or disability amount on their income tax and benefit return, enter the unused amount.</p>   |                           |  |                             |
| <p><b>12. Amounts transferred from a dependant</b> – If your dependant will not use all of their <b>disability amount</b> on their income tax and benefit return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of their <b>tuition amount</b> on their income tax and benefit return, enter the unused amount.</p>   |                           |  |                             |
| <p><b>13. TOTAL CLAIM AMOUNT</b> – Add lines 1 to 12.<br/>Your employer or payer will use this amount to determine the amount of your tax deductions.</p>  |                           |  |                             |
|  |                           |  |                             |

**Filling out Form TD1**

Fill out this form **only** if any of the following apply:

- you have a new employer or payer and you will receive salary, wages, commissions, pensions, employment insurance benefits, or any other remuneration
- you want to change amounts you previously claimed (for example, the number of your eligible dependants has changed)
- you want to claim the deduction for living in a prescribed zone
- you want to increase the amount of tax deducted at source

Sign and date it, and give it to your employer or payer.

If you do not fill out Form TD1, your employer or payer will deduct taxes after allowing the basic personal amount **only**.

**More than one employer or payer at the same time**

If you have more than one employer or payer at the same time and you have already claimed personal tax credit amounts on another Form TD1 for 2020, you **cannot claim them again**. If your total income from all sources will be **more** than the personal tax credits you claimed on another Form TD1, **check this box**, enter "0" on line 13 and do not fill in lines 2 to 12.

**Total income less than total claim amount**

Check this box if your total income for the year from **all** employers and payers will be **less** than your total claim amount on line 13. Your employer or payer will not deduct tax from your earnings.

**Non-residents (Only fill in if you are a non-resident of Canada.)**

As a non-resident of Canada, will 90% or more of your world income be included in determining your taxable income earned in Canada in 2020?

- Yes (Fill out the previous page.)
- No (Enter "0" on line 13, and do not fill in lines 2 to 12 as you are not entitled to the personal tax credits.)

If you are unsure of your residency status, call the international tax and non-resident enquiries line at **1-800-959-8281**.

**Provincial or territorial personal tax credits return**

If your claim amount on line 13 is more than \$13,229, you also have to fill out a provincial or territorial TD1 form. If you are an employee, use the Form TD1 for your province or territory of employment. If you are a pensioner, use the Form TD1 for your province or territory of residence. Your employer or payer will use both this federal form and your most recent provincial or territorial Form TD1 to determine the amount of your tax deductions.

If you are claiming the basic personal amount **only**, your employer or payer will deduct provincial or territorial taxes after allowing the provincial or territorial basic personal amount.

**Note:** If you are a Saskatchewan resident supporting children under 18 at any time during 2020, you may be able to claim the child amount on Form TD1SK, 2020 Saskatchewan Personal Tax Credits Return. Therefore, you may want to fill out Form TD1SK even if you are **only** claiming the basic personal amount on this form.

**Deduction for living in a prescribed zone**

If you live in the Northwest Territories, Nunavut, Yukon, or another prescribed **northern** zone for more than six months in a row beginning or ending in 2020, you can claim any of the following:

- \$11.00 for each day that you live in the prescribed northern zone
- \$22.00 for each day that you live in the prescribed northern zone if, during that time, you live in a dwelling that you maintain, and you are the only person living in that dwelling who is claiming this deduction

\$

Employees living in a prescribed **intermediate** zone can claim 50% of the total of the above amounts.

For more information, go to [canada.ca/taxes-northern-residents](https://canada.ca/taxes-northern-residents).

**Additional tax to be deducted**

You may want to have more tax deducted from each payment, especially if you receive other income, including non-employment income such as CPP or QPP benefits, or old age security pension. By doing this, you may not have to pay as much tax when you file your income tax and benefit return. To choose this option, state the amount of additional tax you want to have deducted from each payment. To change this deduction later, fill out a new Form TD1.

\$

**Reduction in tax deductions**

You can ask to have less tax deducted on your income tax and benefit return if you are eligible for deductions or non-refundable tax credits that are not listed on this form (for example, periodic contributions to a registered retirement savings plan (RRSP), child care or employment expenses, charitable donations, and tuition and education amounts carried forward from the previous year). To make this request, fill out Form T1213, Request to Reduce Tax Deductions at Source, to get a letter of authority from your tax services office. Give the letter of authority to your employer or payer. You do not need a letter of authority if your employer deducts RRSP contributions from your salary.

**Forms and publications**

To get our forms and publications, go to [canada.ca/cra-forms-publications](https://canada.ca/cra-forms-publications) or call **1-800-959-5525**.

Personal information (including the SIN) is collected for the purposes of the administration or enforcement of the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be used or disclosed for purposes of other federal acts that provide for the imposition and collection of a tax or duty. It may also be disclosed to other federal, provincial, territorial or foreign government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties or other actions. Under the Privacy Act, individuals have the right to access their personal information, request correction, or file a complaint to the Privacy Commissioner of Canada regarding the handling of the individual's personal information. Refer to Personal Information Bank CRA PPU 120 on Info Source at [canada.ca/cra-info-source](https://canada.ca/cra-info-source).

**Certification**

I certify that the information given on this form is correct and complete.

Signature \_\_\_\_\_

**It is a serious offence to make a false return.**

Date \_\_\_\_\_

YYYY/MM/DD

**Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your provincial tax deductions.**

Fill out this form based on the best estimate of your circumstances.

|           |                           |   |                         |
|-----------|---------------------------|---|-------------------------|
| Last name | First name and initial(s) | Date of birth (YYYY/MM/DD)  | Employee number         |
| Address   | Postal code               | <b>For non-residents only</b> –<br>Country of permanent residence | Social insurance number |

  

|   |  |
|---|--|
| <p><b>1. Basic personal amount</b> – Every person employed in Manitoba and every pensioner residing in Manitoba can claim this amount. If you will have more than one employer or payer at the same time in 2020, see "More than one employer or payer at the same time" on page 2.</p>   | <p style="font-size: 1.2em; font-weight: bold;">9,838</p>                                |
| <p><b>2. Age amount</b> – If you will be 65 or older on December 31, 2020, and your net income from all sources will be \$27,749 or less, enter \$3,728. If your net income for the year will be between \$27,749 and \$52,602 and you want to calculate a partial claim, get Form TD1MB-WS, Worksheet for the 2020 Manitoba Personal Tax Credits Return, and fill in the appropriate section.</p>  |  |
| <p><b>3. Pension income amount</b> – If you will receive regular pension payments from a pension plan or fund (excluding Canada Pension Plan, Quebec Pension Plan, Old Age Security, or Guaranteed Income Supplement payments), enter \$1,000, or your estimated annual pension income, whichever is less.</p>  |  |
| <p><b>4. Tuition and education amounts (full time and part time)</b> – If you are a student enrolled at a university, college, or educational institution certified by Employment and Social Development Canada, and you will pay more than \$100 per institution in tuition fees, fill in this section. If you are enrolled full time, or if you have a mental or physical disability and are enrolled part time, enter the total of the tuition fees you will pay, plus \$400 for each month that you will be enrolled. If you are enrolled part time and do not have a mental or physical disability, enter the total of the tuition fees you will pay, plus \$120 for each month that you will be enrolled part time.</p> |  |
| <p><b>5. Disability amount</b> – If you will claim the disability amount on your income tax and benefit return by using Form T2201, Disability Tax Credit Certificate, enter \$6,180.</p>   |  |
| <p><b>6. Spouse or common-law partner amount</b> – If you are supporting your spouse or common-law partner who lives with you and whose net income for the year will be less than \$9,134, enter the difference between \$9,134 and their estimated net income. If their net income for the year will be \$9,134 or more, you cannot claim this amount.</p>   |  |
| <p><b>7. Amount for an eligible dependant</b> – If you do not have a spouse or common-law partner and you support a dependent relative who lives with you and whose net income for the year will be less than \$9,134, enter the difference between \$9,134 and their estimated net income. If their net income for the year will be \$9,134 or more, you cannot claim this amount.</p>   |  |
| <p><b>8. Caregiver amount</b> – If you are taking care of a dependant who lives with you, whose net income for the year will be \$12,312 or less, and who is either your or your spouse's or common-law partner's:</p> <ul style="list-style-type: none"> <li>• parent or grandparent (aged 65 or older)</li> <li>• relative (aged 18 or older) who is dependent on you because of an infirmity, enter \$3,605</li> </ul> <p>If the dependant's net income for the year will be between \$12,312 and \$15,917 and you want to calculate a partial claim, get Form TD1MB-WS and fill in the appropriate section.</p>   |  |
| <p><b>9. Amount for infirm dependants age 18 or older</b> – If you are supporting an infirm dependant aged 18 or older who is your or your spouse's or common-law partner's relative, who lives in Canada, and whose net income for the year will be \$5,115 or less, enter \$3,605. You cannot claim an amount for a dependant you claimed on line 8. If the dependant's net income for the year will be between \$5,115 and \$8,720 and you want to calculate a partial claim, get Form TD1MB-WS and fill in the appropriate section.</p>   |  |
| <p><b>10. Amounts transferred from your spouse or common-law partner</b> – If your spouse or common-law partner will not use all of their age amount, pension income amount, tuition and education amounts, or disability amount on their income tax and benefit return, enter the unused amount.</p>   |  |
| <p><b>11. Amounts transferred from a dependant</b> – If your dependant will not use all of their <b>disability amount</b> on their income tax and benefit return, enter the unused amount. If your or your spouse's or common-law partner's dependent child or grandchild will not use all of their <b>tuition and education amounts</b> on their income tax and benefit return, enter the unused amount.</p>   |  |
| <p><b>12. Manitoba Family Tax Benefit</b> – Get Form TD1MB-WS and fill in the appropriate section.</p>  |  |
| <p><b>13. TOTAL CLAIM AMOUNT</b> – Add lines 1 to 12.<br/>Your employer or payer will use this amount to determine the amount of your provincial tax deductions.</p>  | <div style="border: 1px solid black; width: 100px; height: 30px; margin: 0 auto;"></div> |

**Filling out Form TD1MB**

Fill out this form **only** if you are an employee working in Manitoba or a pensioner residing in Manitoba and any of the following apply:

- you have a new employer or payer and you will receive salary, wages, commissions, pensions, employment insurance benefits, or any other remuneration
- you want to change amounts you previously claimed (for example, the number of your eligible dependants has changed)
- you want to increase the amount of tax deducted at source

Sign and date it, and give it to your employer or payer.

If you do not fill out Form TD1MB, your employer or payer will deduct taxes after allowing the basic personal amount **only**.

**More than one employer or payer at the same time**

If you have more than one employer or payer at the same time and you have already claimed personal tax credit amounts on another Form TD1MB for 2020, you **cannot claim them again**. If your total income from all sources will be **more** than the personal tax credits you claimed on another Form TD1MB, **check** this box, enter "0" on line 13 on the front page and do not fill in lines 2 to 12.

**Total income less than total claim amount**

Check this box if your total income for the year from **all** employers and payers will be **less** than your total claim amount on line 13. Your employer or payer will not deduct tax from your earnings.

**Additional tax to be deducted**

If you wish to have more tax deducted, fill in "Additional tax to be deducted" on the federal Form TD1.

**Reduction in tax deductions**

You can ask to have less tax deducted on your income tax and benefit return if you are eligible for deductions or non-refundable tax credits that are not listed on this form (for example, periodic contributions to a registered retirement savings plan (RRSP), child care or employment expenses, charitable donations, and tuition and education amounts carried forward from the previous year). To make this request, fill out Form T1213, Request to Reduce Tax Deductions at Source, to get a letter of authority from your tax services office. Give the letter of authority to your employer or payer. You do not need a letter of authority if your employer deducts RRSP contributions from your salary.

**Forms and publications**

To get our forms and publications, go to [canada.ca/cra-forms-publications](https://canada.ca/cra-forms-publications) or call **1-800-959-5525**.

Personal information (including the SIN) is collected for the purposes of the administration or enforcement of the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be used or disclosed for purposes of other federal acts that provide for the imposition and collection of a tax or duty. It may also be disclosed to other federal, provincial, territorial or foreign government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties or other actions. Under the Privacy Act, individuals have the right to access their personal information, request correction, or file a complaint to the Privacy Commissioner of Canada regarding the handling of the individual's personal information. Refer to Personal Information Bank CRA PPU 120 on Info Source at [canada.ca/cra-info-source](https://canada.ca/cra-info-source).

**Certification**

I certify that the information given on this form is correct and complete.

Signature \_\_\_\_\_

Date \_\_\_\_\_

**It is a serious offence to make a false return.**



# THE UNIVERSITY OF WINNIPEG

## **DIRECT DEPOSIT FORM FOR PAYROLL**

**PAYROLL PAYMENTS ARE ISSUED BY DIRECT DEPOSIT ONLY**

**TO CHANGE YOUR BANKING INFORMATION YOU MUST COMPLETE AND SIGN A NEW FORM.**

### **PERSONAL INFORMATION**

**EMPLOYEE NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

\_\_\_\_\_

**DEPARTMENT:** \_\_\_\_\_

### **BANKING INFORMATION**

**FINANCIAL INSTITUTION:** \_\_\_\_\_

**One of the following must be attached to this form:**

- Direct deposit information printout from your financial institution
- Cheque marked "VOID"

### **SIGNATURE**

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**New employee:** Completed form must be attached to employment form, stipend or contract.

**Existing employee:** Return completed form to the Human Resources/Payroll Office.

**INCORRECT INFORMATION RESULTS IN NO PAYMENT BEING MADE.**