

New Hires Checklist Guide

It's recommended that you complete your checklist on a computer.

In the checklist, employee will complete:

- Employee Information Form
- State of Oklahoma Outstanding Wage Beneficiary Form
- Oklahoma Teachers' Retirement System Notification Form
- Loyalty Oath Form – with instructions to meet with HR Admin or locate a notary and then upload the notarized form.
- Upload immigration documents and OSU Work Permit Form
- Voluntary Self-Identification of Disability Form
- Veteran Voluntary Self-Identification Form
- CHS Confidentiality Agreement Form (For Center of Health Sciences only)
- CHS Hepatitis B Declination Form (For Center of Health Sciences only)
- CHS Policies and Procedures Form (For Center of Health Sciences only)

Employees will need to complete these in Banner Self-Service **after** they have their O-Key account.

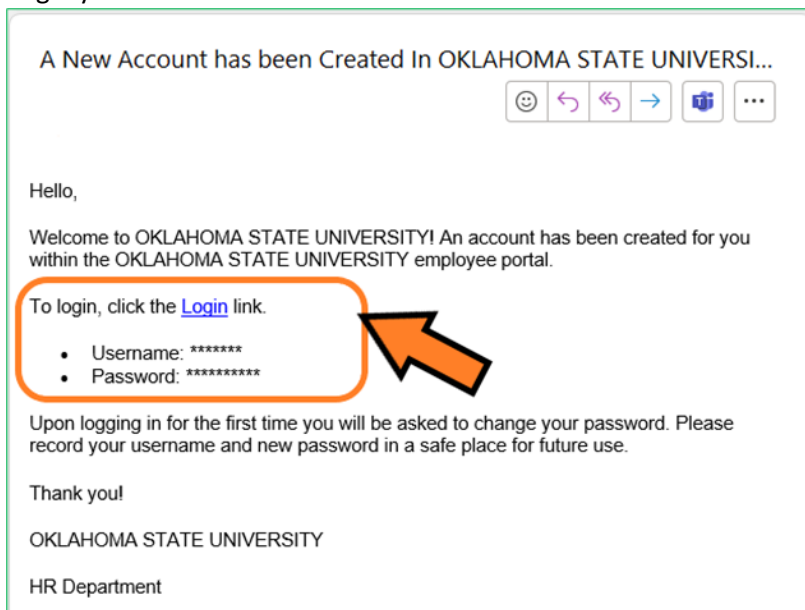
- Withholding Form
- Direct Deposit Form

Employees can complete this optional form with OSU Payroll **after** they receive the email from your department administrator.

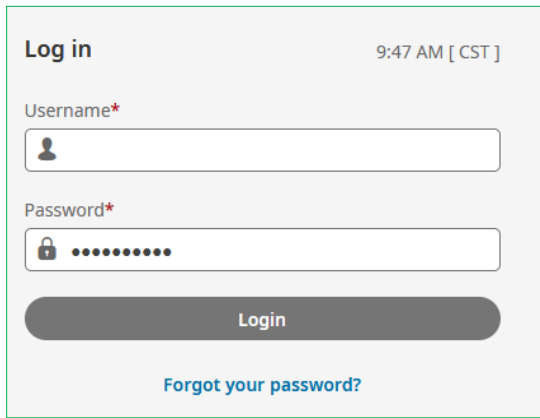
- Salary Deferral Form (***For full-time faculty only***)

If you have any questions, please contact your department administrator or hiring manager.

1. Open the email with subject line “**A New Account has been Created in OKLAHOMA STATE UNIVERSITY's Employee Portal**” and you will see a Login link, Username, and Password. Click on the login link to login to your account to begin your checklist.

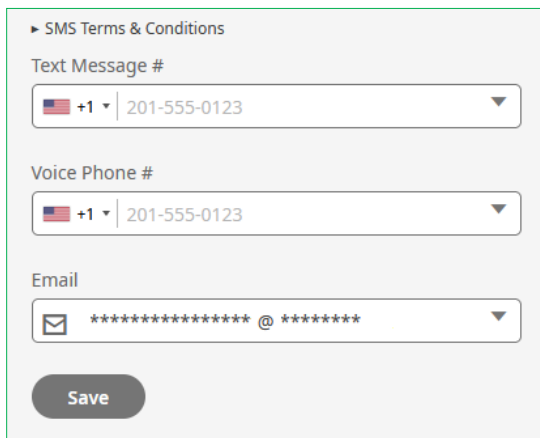


2. Enter the Username and Password provided in the email and click login.



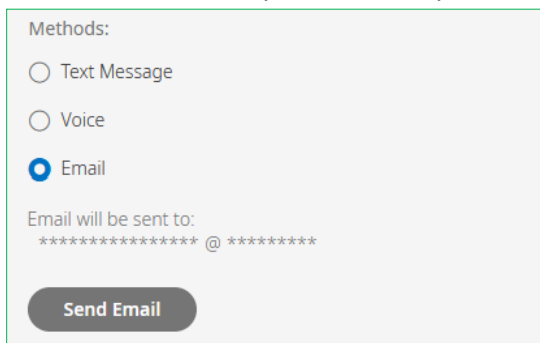
The login form is titled "Log in" and shows the time "9:47 AM [CST]". It contains two input fields: "Username*" with a person icon and "Password*" with a lock icon and masked characters. Below the fields is a "Login" button and a link for "Forgot your password?".

3. For virtual code settings, you can provide a phone number or continue to use your email account. Click Save.



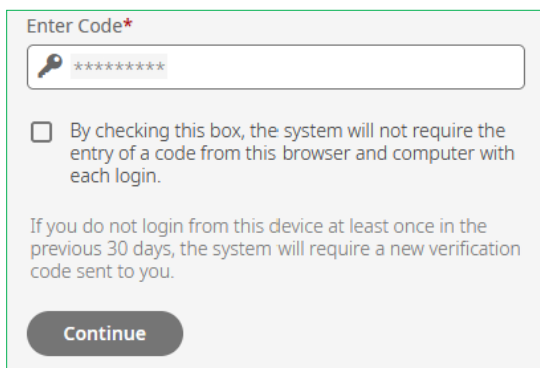
The form is titled "SMS Terms & Conditions" and includes three dropdown menus: "Text Message #" (country: +1, number: 201-555-0123), "Voice Phone #" (country: +1, number: 201-555-0123), and "Email" (masked address). A "Save" button is at the bottom.

4. Click "Send Email" button and the system will send a code to your email account. Click on email with subject line "ACTION REQUIRED by User" to see your code.



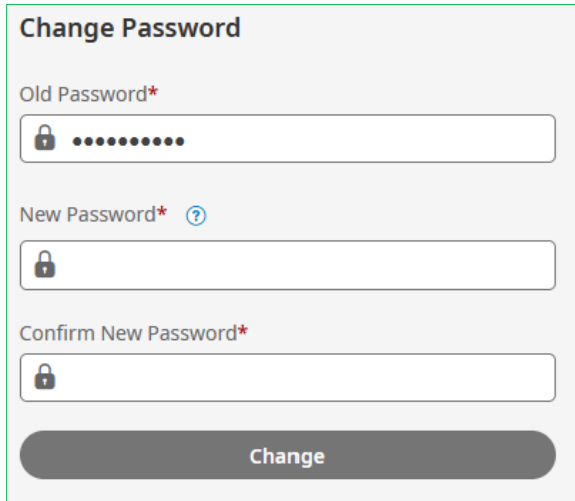
The form shows "Methods:" with radio buttons for "Text Message", "Voice", and "Email" (selected). Below is "Email will be sent to:" with a masked email address and a "Send Email" button.

5. Enter the code and click "Continue" button.



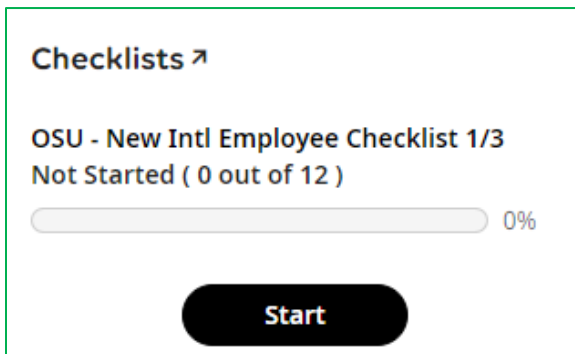
The form is titled "Enter Code*" and has a key icon and a masked input field. It includes a checkbox for "By checking this box, the system will not require the entry of a code from this browser and computer with each login." and a "Continue" button.

6. Create a new password. Click “Change” button. **NOTE:** Keep the password in a safe place as you will need it if you must get back into the system.



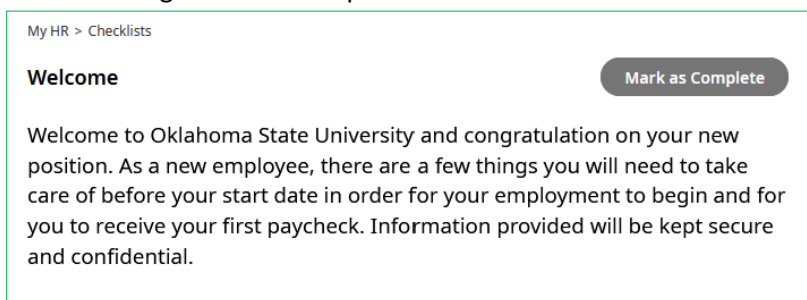
The image shows a 'Change Password' form with three input fields and a 'Change' button. The first field is 'Old Password*' with a lock icon and a password mask of 10 dots. The second field is 'New Password*' with a lock icon and a help icon. The third field is 'Confirm New Password*' with a lock icon. The 'Change' button is a dark grey rounded rectangle at the bottom.

7. On the Home Screen, you will see a checklist listed. Click on the “Start” button to begin your checklist.



The image shows a 'Checklists' screen. At the top is the title 'Checklists' with a right-pointing arrow. Below it is a checklist item: 'OSU - New Intl Employee Checklist 1/3' followed by 'Not Started (0 out of 12)'. A progress bar below this shows 0% completion. At the bottom is a large black rounded button labeled 'Start'.

8. The first page displays the welcome message. Review information listed and click “**Mark as Complete**” to proceed to the next section. Acknowledge all popup messages. If you do not click Mark as Complete on each page, your process will not be registered as complete.



The image shows a 'Welcome' screen. At the top left is the breadcrumb 'My HR > Checklists'. Below it is the title 'Welcome' and a dark grey rounded button labeled 'Mark as Complete'. The main text reads: 'Welcome to Oklahoma State University and congratulation on your new position. As a new employee, there are a few things you will need to take care of before your start date in order for your employment to begin and for you to receive your first paycheck. Information provided will be kept secure and confidential.'

9. This section contains Personal Information Update, Biographical Information Update, Education Background Update, and Emergency Contacts Update. You will be able to go back and forth for any correction before moving to the next section. **NOTE:** Once you submit and move on to the next section, you will not be able to go back to previous section for any edits or correction. Acknowledge all popup messages.

Employee Information Update

- Personal Information Update**
- Biographical Information Update
- Educational Background Update - List your HIGHEST degree or...
- Educational Background Update - Additional Degree or Diploma
- Emergency Contact(s) Update

Personal Information Update

Banner ID (if available)

Social Security *

Preferred Name *

Legal First Name *

Middle Name *

Last Name (Family name / Surname) *

Country *

Street *

Zip *

Personal Information Update

- Biographical Information Update
- Educational Background Update - List your HIGHEST degree or diploma first
- Educational Background Update - Additional Degree or Diploma
- Emergency Contact(s) Update

Biographical Information Update

Birthdate *

Gender *

Marital Status *

Ethnicity *

Personal Information Update

- Biographical Information Update
- Educational Background Update - List your HIGHEST degree or diploma first**
- Educational Background Update - Additional Degree or Diploma
- Emergency Contact(s) Update

Educational Background Update - List your HIGHEST degree or diploma first

Degree 1 *

Year Received 1 *

Institution Name 1 *

Institution Location 1 *

Field of Study 1 *

Personal Information Update

- Biographical Information Update
- Educational Background Update - List your HIGHEST degree or diploma first
- Educational Background Update - Additional Degree or Diploma
- Emergency Contact(s) Update**

Emergency Contact(s) Update

Account Contacts

< Page 1 of 1 0 Rows All (0) + Add


Name	Relationship	Code	Preferred Phone Number
No Data to Display			

10. Next section begins with introduction and instructions for our custom forms. Review information and click **“Mark as Complete”** to proceed to the next step.

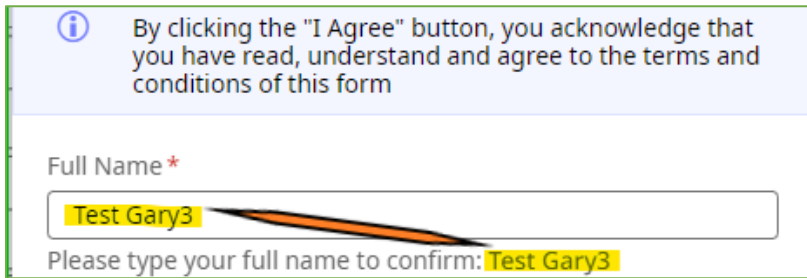
My HR > Checklists

Instructions for other forms

For the next few items, the form is broken up into multiple pages. Certain forms require you to complete only page one, while others may require you to complete all pages. To navigate between pages, click on the arrow < **Page 1 of 2** > on the form.

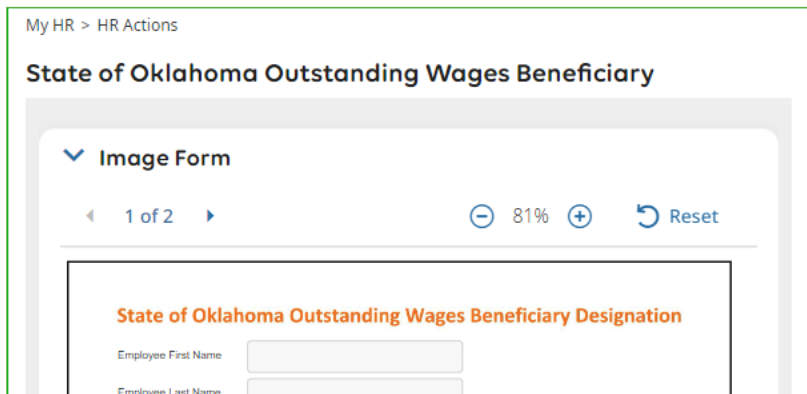


When signing the form, be sure to type your name as it appears on the signature pop-up window. **They are case- and space sensitive.** (Do not copy and paste)



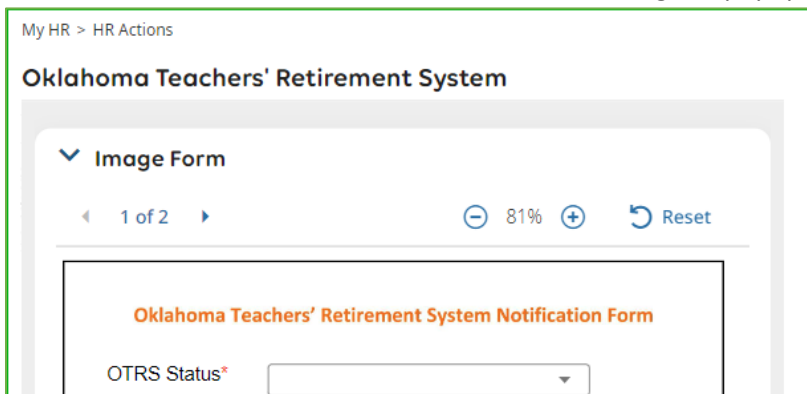
The screenshot shows a light blue header with an information icon and the text: "By clicking the 'I Agree' button, you acknowledge that you have read, understand and agree to the terms and conditions of this form". Below this is a "Full Name *" label and a text input field containing "Test Gary3". A yellow highlight is under "Test Gary3" in the input field. Below the input field, the text reads: "Please type your full name to confirm: Test Gary3", with "Test Gary3" also highlighted in yellow.

11. Fill out the Wage Beneficiary form. *If you do not wish to fill in any information, you are still required to **Sign and Agree** on page 2 of the form* and click on "**Submit**" button to move to the next form. Acknowledge all popup messages.



The screenshot shows a web interface with the breadcrumb "My HR > HR Actions". The main heading is "State of Oklahoma Outstanding Wages Beneficiary". Below it is a "Image Form" section with a dropdown arrow. Navigation controls show "1 of 2", a zoom level of "81%", and a "Reset" button. The form content includes the title "State of Oklahoma Outstanding Wages Beneficiary Designation" and two input fields labeled "Employee First Name" and "Employee Last Name".

12. Fill out the Oklahoma Teachers' Retirement System (OTRS) Update form. **Sign and Agree** to the form and click "**Submit**" button to move to the next form. Acknowledge all popups messages.



The screenshot shows a web interface with the breadcrumb "My HR > HR Actions". The main heading is "Oklahoma Teachers' Retirement System". Below it is an "Image Form" section with a dropdown arrow. Navigation controls show "1 of 2", a zoom level of "81%", and a "Reset" button. The form content includes the title "Oklahoma Teachers' Retirement System Notification Form" and a dropdown menu labeled "OTRS Status*".

13. For Loyalty Oath, you will need:

1. Download the form
2. Click "Mark as complete", proceed to next form
3. Get notarized by your employer or HR Office

Failure to upload completed Loyalty Oath will delay hiring processing.

My HR > Checklists

Loyalty Oath

Mark as Complete

Affirms that the Constitution and laws of the U.S. and the State of Oklahoma will be upheld. [Download the document here](#) and print, and complete in front of a notary.

Your employer or department can help you notarize and upload the Loyalty Oath.

i A maximum of 5 files are allowed to be selected per upload.

Upload Document

Choose No file chosen

14. Fill out Disability form and click **“Submit”** button to proceed to the next form.

My HR > HR Actions

Voluntary Self-Identification of Disability

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

Effective From *

03/21/2023

Save **Submit**

Disability Information

Disability *

15. Fill out the Veteran fields and click **“Submit”** to proceed to the next section. Acknowledge all popup messages.

My HR > HR Actions

Veteran Voluntary Self-Identification

Effective From *

12/09/2022

Save **Submit**

Veteran Information

Veteran

Are You A Protected Veteran *

16. For Immigration Documents, you will need to upload a scanned copy of your immigration documents. Click **“Mark as complete”**, proceed to the next form.

My HR > Checklists

Immigration Documents

Mark as Complete

Please scan and upload your Immigration Documents (up to 5 documents)

Possible documents could be: EAD, I-94, passport, visa page, receipt notice, approval notice, I-20, DS-2019, etc.

Click **Mark as Complete** button once you finish uploading your documents.

i A maximum of 5 files are allowed to be selected per upload.

Upload Document

Choose No file chosen

17. Fill out the OSU Work Permit form. Sign and Agree to the form and click **“Submit”** button to move to the next form. Acknowledge all popups messages.

My HR > Forms

OSU Work Permit - Intl Employee

Submit Save ...

Image Form

1 of 1 107% Reset

OSU Work Permit

Banner ID First Name Last Name

Email Local Street Address

18. For GLACIER Acknowledgement, review information and click “**Mark as Complete**”.

My HR > Checklists

GLACIER Acknowledgement

Mark as Complete

Thank you for uploading Immigration Documents and completing the OSU Work Permit. Information provided will be kept secure and confidential.

OSU Immigration Officer and Tax & Compliance Officer will review your Immigration Documents and OSU Work Permit soon. They may follow-up with you via email for any questions or missing documents.

Be on the lookout for an email coming from **GLACIER** Online Tax Compliance System:

19. (**For OSU-CHS employees only**) Fill out all OSU-Center for Health Sciences Acknowledgement forms.

- a. Confidentiality Agreement form
- b. Hepatitis B Declination form
- c. Policies and Procedures form
- d. Download and review CHS New Hire Information

Congratulations! You completed 1 of 3 of your checklist.

OSU Immigration Officer and OSU Tax & Compliance Officer will review your Immigration Documents and OSU Work Permit. They may follow-up with you via email for any questions or missing documents. Be on the lookout for an email coming from GLACIER Online Tax Compliance System:

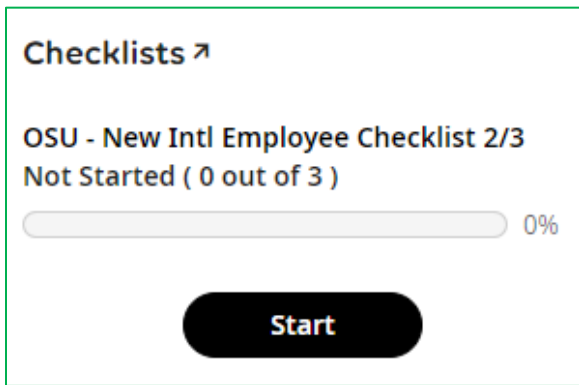
- You will need to follow the instructions provided in GLACIER's email.
- Be sure to save a copy of your Tax Summary Report from GLACIER.
- Upload the Tax Summary Report to your next checklist in the Employee Portal.

Part 2 of 3 of your Checklist Guide

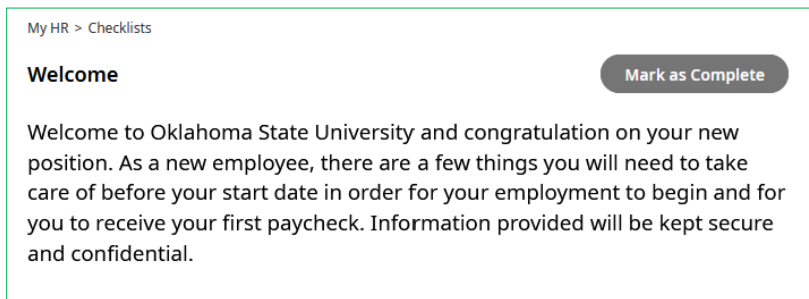
Once you complete your Glacier Online Tax Compliance System, be sure to save a copy of your Tax Summary Report. You will need to upload the summary report to the OKLAHOMA STATE UNIVERSITY's Employee Portal.

Login to your portal [here](#).

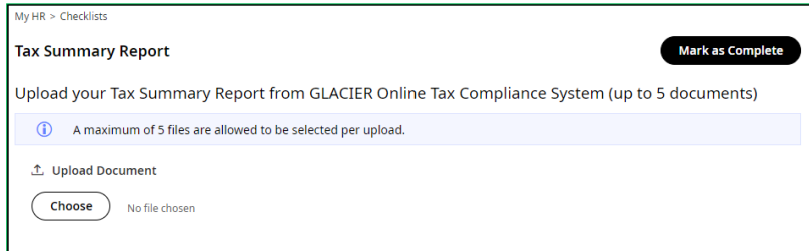
1. On the Home Screen, you will see a checklist listed. Click on the “Start” button to begin your checklist.



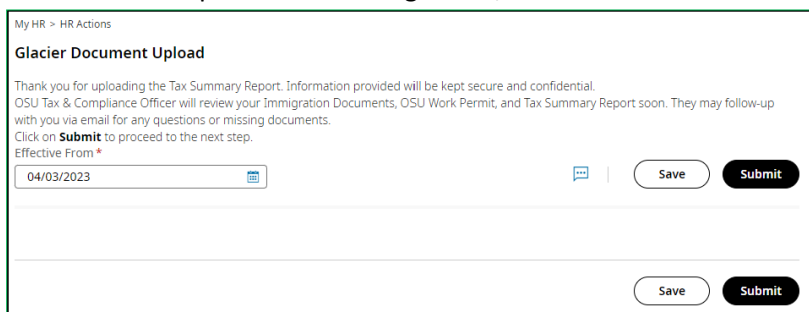
2. The first page displays the welcome message. Review information listed and click “Mark as Complete” to proceed to the next section. Acknowledge all popup messages.



3. For Tax Summary Report, you will need to upload a copy of your Tax Summary Report from GLACIER Online Tax Compliance System. Click “Mark as complete”, proceed to the next form.



4. For Document Upload Acknowledgement, review information and click “Submit”.



Congratulations! You completed 2 of 3 of your checklist.

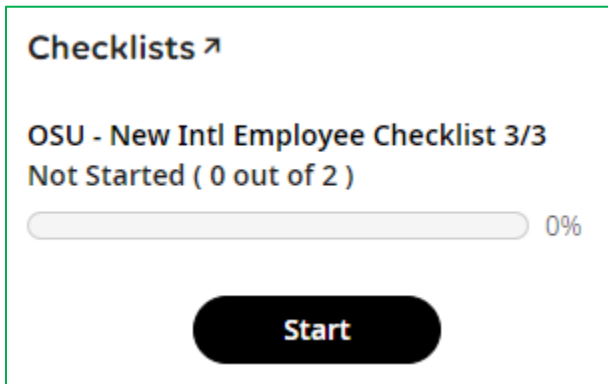
OSU Tax & Compliance Officer will review your Immigration Documents, OSU Work Permit, and Tax Summary Report. They may follow-up with you via email for any questions or missing documents. Once your OSU Work Permit is approved, you will receive an email notification to complete the next checklist in the Employee Portal.

Part 3 of 3 of your Checklist Guide

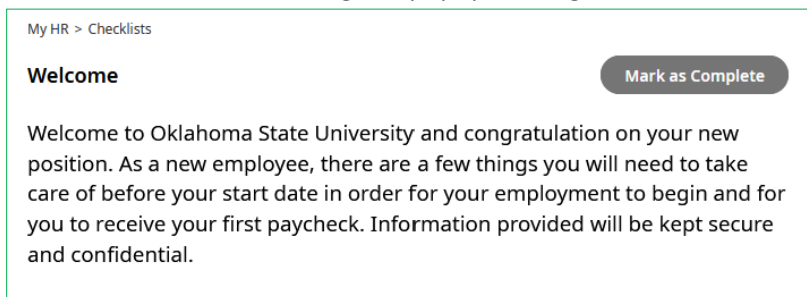
Once your OSU Work Permit is approved, you will need to complete the I-9 form in the OKLAHOMA STATE UNIVERSITY's Employee Portal.

Login to your portal [here](#).

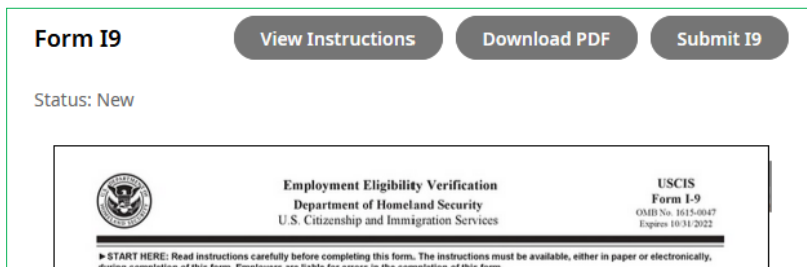
1. On the Home Screen, you will see a checklist listed. Click on the “Start” button to begin your checklist.



2. The first page displays the welcome message. Review information listed and click “Mark as Complete” to proceed to the next section. Acknowledge all popup messages.



3. Fill out the I-9 form and click “Submit” button to sign and agree to the form. Acknowledge all popup messages.



4. While signing your I9 form, be sure to type your name as it appears on the Submit I9 pop-up window. ***They are case- and space-sensitive.***

Submit I9 ✕

i Please type your full name to confirm: **Test.Gary3**

Full Employee Name *

Test.Gary3

Please read all information below. Populating required fields and clicking the Agree button below will submit this form to your

Congratulations! You completed 3 of 3 of your checklist.

You will need to make an appointment with your employer or department HR office to complete the I9 verification in-person or remotely, if appropriate. Additional guidance and resources will be emailed to you by your employer or department administrator once you have fully completed the I9 identification process and notarization of the loyalty oath form.