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)
- I9 Form

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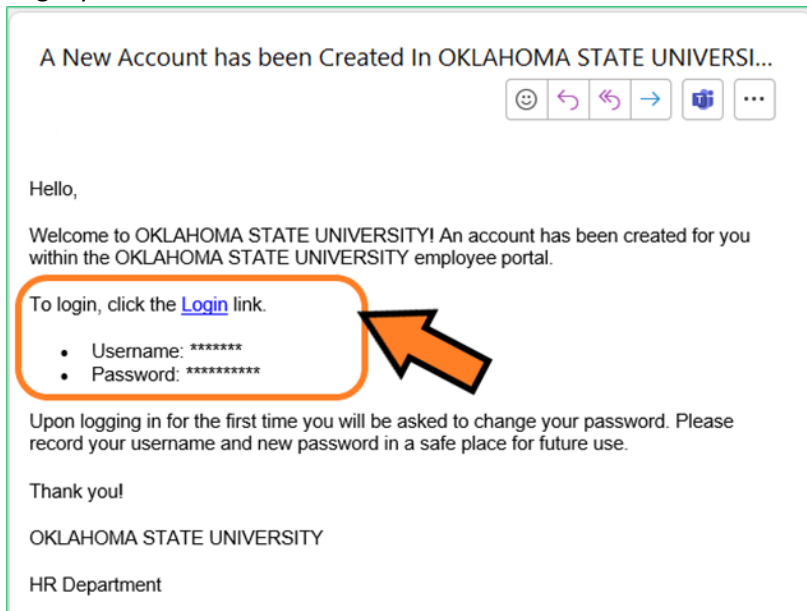- Direct Deposit Form

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.

Log in   9:47 AM [CST]

Username*

👤

Password*

🔒 ••••••••••

Login

Forgot your password?

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

▶ SMS Terms & Conditions

Text Message #

🇺🇸 +1 ▾ | 201-555-0123   ▾

Voice Phone #

🇺🇸 +1 ▾ | 201-555-0123   ▾

Email

✉ **************** @ ********   ▾

Save

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.

Methods:

◯ Text Message

◯ Voice

🔵 Email

Email will be sent to:
**************** @ *********

Send Email

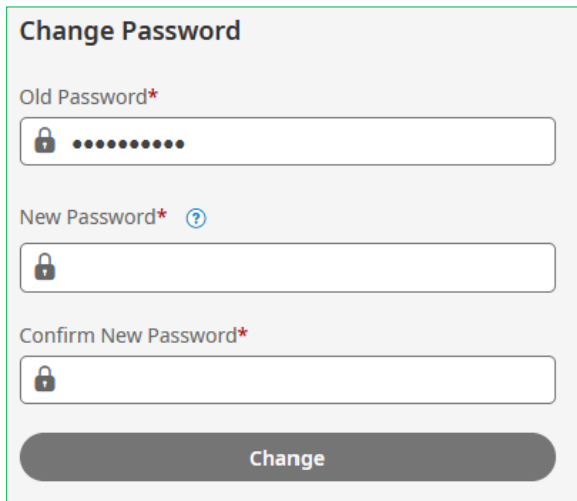5. Enter the code and click "Continue" button.

Enter Code*

🔑 ********

☐ By checking this box, the system will not require the entry of a code from this browser and computer with each login.

If you do not login from this device at least once in the previous 30 days, the system will require a new verification code sent to you.
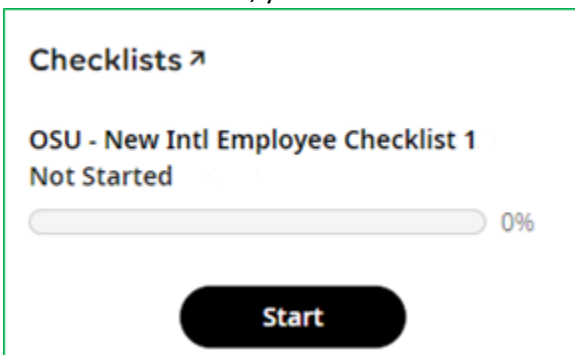
Continue

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.
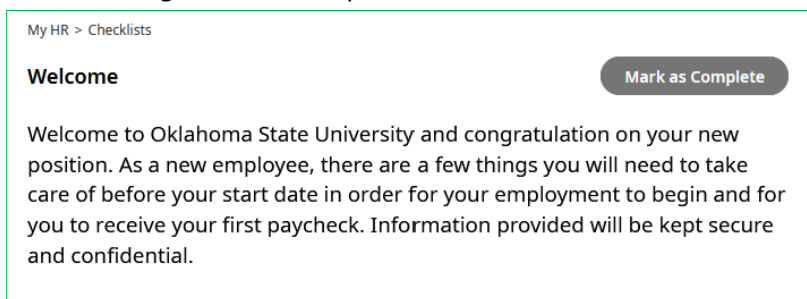
Change Password

Old Password*

🔒 •••••••••

New Password* ⑦

🔒

Confirm New Password*

🔒

Change

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

Checklists ↗

OSU - New Intl Employee Checklist 1
Not Started

0%

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.

My HR > Checklists

Welcome   Mark as Complete

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

Personal Information Update

Banner ID (if available)

Social Security *
999-99-9999

Preferred Name *

Legal First Name. *

Middle Name *

Last Name (Family name / Surname) *

Country *
United States

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

Birthday *
mm/dd/yyyy

Gender *

Marital Status *

Ethnicity *
Choose...

Save   Continue

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 *

Save   Continue

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 Numb
ⓘ No Data to Display			

Save   Continue

---

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.
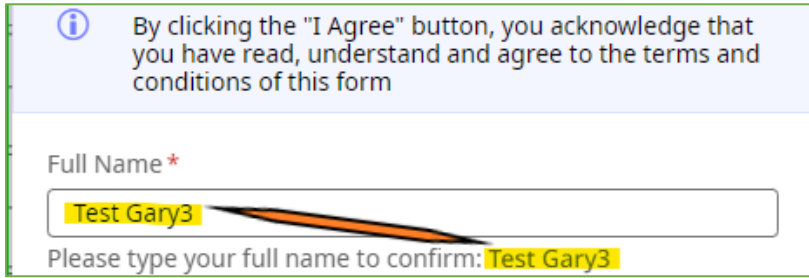

My HR > Checklists

Instructions for other forms   **Mark as Complete**

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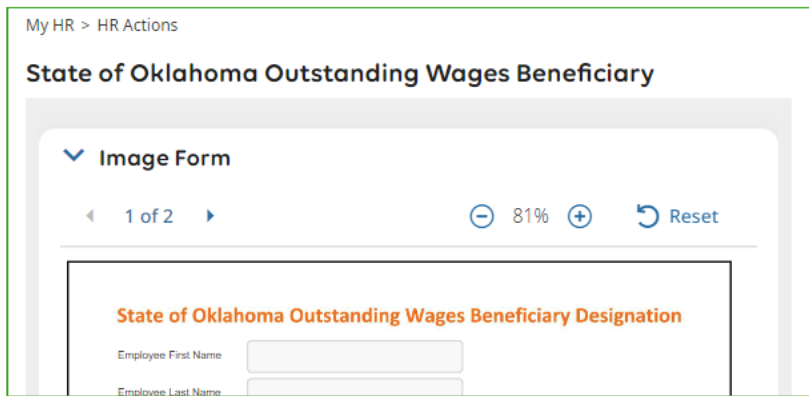
When signing the form, be sure to type your name as it appears on the signature pop-up window. ***They are case- and space sensitive***. (Do not copy and paste)
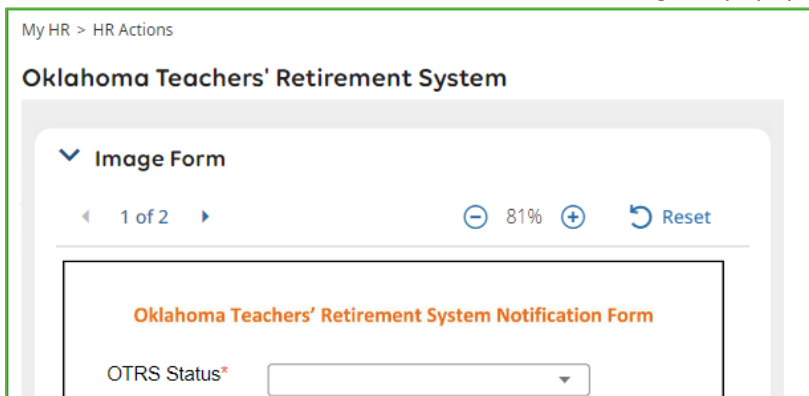

11. Fill out the Wage Beneficiary form. *If you do not wish to fill in any information, you are still required to **Sign and Agree** on page 2 of the form* and click on "**Submit**" button to move to the next form. Acknowledge all popup messages.

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.

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.

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.

ⓘ   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.

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.

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.

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.

ⓘ   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.

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

19. (**For OSU-CHS employees only**) Fill out all OSU-Center for Health Sciences Acknowledgement forms.
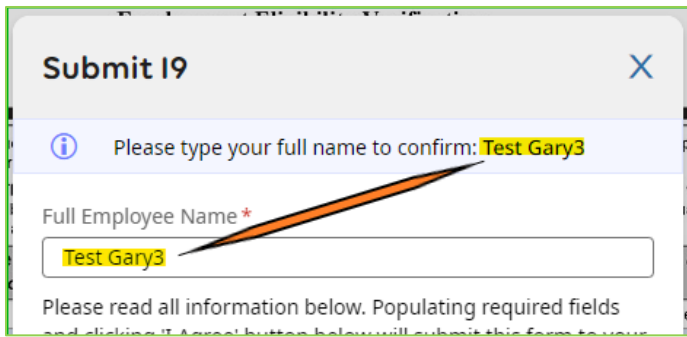   a. Confidentiality Agreement form
    b. Hepatitis B Declination form
    c. Policies and Procedures form
    d. Download and review CHS New Hire Information

20. Next section begins with introduction and instructions for I-9 form. Review information and click "**Mark as Complete**" to proceed to the I9 form.

21. Fill out the I-9 form and click "Submit" button to sign and agree to the form. Acknowledge all popup messages.

22. 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**.

Congratulations! You completed your checklist 1.

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.
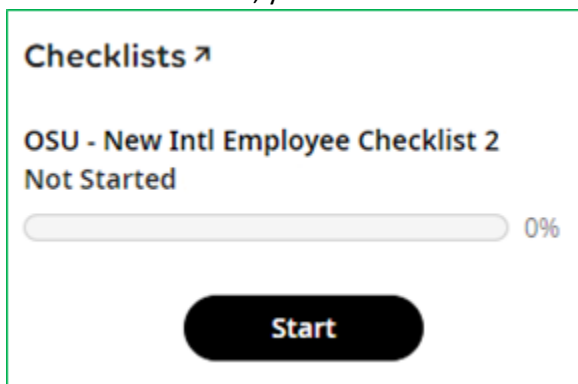- Upload the Tax Summary Report to your next checklist in the Employee Portal.

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.

Checklist 2 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.

> My HR > Checklists
>
> **Welcome**
>
> [Mark as Complete]
>
> 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.

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.

> My HR > Checklists
>
> **Tax Summary Report**
>
> [Mark as Complete]
>
> Upload your Tax Summary Report from GLACIER Online Tax Compliance System (up to 5 documents)
>
> ⓘ A maximum of 5 files are allowed to be selected per upload.
>
> ⬆ **Upload Document**
>
> [Choose] No file chosen

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

> My HR > HR Actions
>
> **Glacier Document Upload**
>
> Thank you for uploading the Tax Summary Report. Information provided will be kept secure and confidential.
> OSU Tax & Compliance Officer will review your Immigration Documents, OSU Work Permit, and Tax Summary Report soon. They may follow-up with you via email for any questions or missing documents.
> Click on **Submit** to proceed to the next step.
> Effective From *
>
> 04/03/2023   [Save] [Submit]
>
> [Save] [Submit]

Congratulations! You completed your checklist 2.

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.