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.
- I9 Form
- OSU Work Permit Form and upload immigration documents
- 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.

![Login page](image)

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

![Virtual code settings](image)

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

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.

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

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

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.
17. Fill out the Work Permit for International Position 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

Congratulations! You completed 1 of 3 of your checklist.

OSU 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:
   • 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.

![Checklist Image](image)

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.

![Welcome Image](image)

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.

![Upload Image](image)

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 soon. 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.

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.