

# NEW EMPLOYEE SIGN-UP CHECK LIST

*No employee may commence work prior to the completion of the I-9 form, including the social security number field. If you have questions regarding this requirement, please contact OSU Human Resources. All new employee sign-up documents should be placed in a sealed business envelope addressed to Human Resources, Confidential New Employee Sign-up, 106A Whitehurst, in order to keep social security numbers and financial information secure and confidential.*

## **Banner General Person Request (EPAF)**

- General Person Request: For individuals who do not have a Banner presence as a student, vendor or current/past employee, please follow the General Person Setup Request process. This must be completed in order to begin the EPAF.

The following forms should be typed or legibly printed in blue or black ink by the employee and an authorized departmental representative, arranged in the order listed below, then stapled securely together. This packet should be routed through the department's normal administrative channels, then placed in a sealed envelope and sent to Human Resources, labeled Confidential New Employee Sign-Up, 106A Whitehurst. Please use the following as a checklist of all items to be completed during the sign-up. *Incomplete sign-ups will not be worked until all forms are received.*

## **Personal Information Form (PIF)**

- All new employees and rehires are required to complete the entire PIF, including race and or ethnicity.

## **Loyalty Oath**

- All employee and notary information is clear, including notary seal.

## **Oklahoma Teachers' Retirement System Notification Form**

### **State of Oklahoma Outstanding Wages Beneficiary Designation Form - Voluntary**

- Employee has legibly completed all information and signed and dated the form.
- The employee should keep a copy for his/her records.

### **I-9 Employment Eligibility Verification Form / E-Verify Case Details and Accompanying Documentation, if any**

- Employee has completed ALL of Section 1 with signature and date.
- Department reviewed documents furnished by the employee, verified employment eligibility in Section 2, and signed and dated the form. If presented, copies of the US Passport or EAD card must be attached.

### **Copy of Employee's Social Security Card (for Payroll)**

### **Employee's Withholding Allowance Certificate (W-4)**

- Federal and State Withholdings – Federal tax withholdings default to single with no dependents. Changes can be made on Self-Service Banner, my.okstate.edu, therefore, a form should not be submitted.
- Oklahoma State Taxes will be withheld at the single with no allowances rate. Changes can be made by following the instructions on this form.

### **Automatic Deposit Transmittal Form**

- Employee has legibly completed all information and signed and dated the form.
- A voided check has been attached for a checking account. For a savings account, an official signed letter from the financial institution on their letterhead with the Bank Routing Number and Account Number has been attached.

### **International Employees**

- All employees who are not U.S. citizens or Permanent Residents (Green Card Holders) must receive a work permit.
- Trisha Iyonsi in the ISS Office conducts mandatory work permit sessions for students. Please consult the ISS website for the schedule at <https://lcl.okstate.edu/iss/general-employment-and-tax-information.html#2>.
- International Faculty and Staff must make an appointment to receive a work permit by calling 405-744-5459.
- Assistance on the W-4 and on the first page of the I-9 will be provided. Please contact Trisha Iyonsi with questions related to page 2 of the I-9.

### **Voluntary Self-Identification of Disability Form**

- Employee has legibly completed all information and signed and dated the form.

### **Veteran Voluntary Self-Identification Form**

- Employee has selected all classifications of protected veterans that apply, completed the retirement/release from active duty/discharge date, and signed and dated the form.

Give the employee a copy of the following information: Employee Info Handouts as listed at <http://hr.okstate.edu/hr/new-hire-info>.