



Professional Employee Checklist

Welcome to Montana State University! The information and forms in this packet will assist you in completing the required Human Resource employment paperwork. Additionally, to better acquaint you with MSU, and your benefits, Human Resources offers a New Employee Orientation (NEO) and a New Employee Benefits Orientation (NEBO). Please view the dates of these orientations at www.montana.edu/hr. Click on the "Training" tab in the top right for a link to the NEO/NEBO schedule. To reserve a seat, please contact the Office of Human Resources at 406-994-3651. If you need assistance at any point while completing your paperwork, please call or stop by the Human Resource office anytime between the hours of 8:00AM to 5:00PM.

Below is a list of the required forms. Please note that there are various time requirements for submission ranging from 3 to 30 days from your first day of work. IMPORTANT, if you do not complete the "Choices" Health Benefit Forms within the first 30 days of employment, your coverage will default to the Blue Cross Blue Shield plan for employee only and you will forfeit the ability to add a spouse at a later date without a qualifying event.

Name: _____ FTE: _____

Department: _____ Appointment Length & Start Date: _____

Please submit to the Office of Human Resources within 3 days of employment.

- Eligibility Verification Form (I9) Completed _____
- W-4 Form..... Completed _____
- Registration for New Employee Orientation Completed _____
- Registration for New Employee Benefit Orientation Completed _____

Please submit to the Office of Human Resources within 30 Days of Employment

- CHOICES Form(s) – Enrollment for Insurance Completed _____
- Online TIAA/CREF Retirement Enrollment www.tiaa-cref.org/montana Completed _____
- State of Montana Designation of Decedents Warrants Completed _____
- Retirement System Information for Previous Employment Completed _____
- Certification of Prior Employment for Vacation Leave Earned Completed _____
- Workers Compensation Subsequent Injury Form Completed _____
- MSU Vehicle Use Agreement Form Completed _____
- Direct Deposit form for Payroll Completed _____

Please submit to The Technology Transfer Office within 30 days of employment.

- Intellectual Property Agreement for MSU Personnel Completed _____
 - Located on the My Apps tab in MyInfo

Please complete online within 30 days of employment.

- Equity Training Completed _____

(Discrimination and Harassment Prevention and Title IX Compliance Training)

 - Located on the MyApps tab in MyInfo

Please complete within 30 days of employment.

- Degree History Form Completed _____
 - Located at <http://www.montana.edu/hr/documents/NewTermEmp/DegreeHistory.pdf>

Please return to the Office of Human Resources when completed.

I have read the information contained within the New Employee Packet.

Employee Signature: _____ **Date:** _____

ADDITIONAL INFORMATION

W-4 Withholding Certificate

1. Completion of the form W-4 will determine the amount of Federal and State Income Tax withheld from your payroll check.
2. **Your home address will initially be entered in our database from your W-4.** If you subsequently change your address, you can print a change of address form by visiting <http://www.montana.edu/hr>, click on 'All Forms', then scroll down to 'Miscellaneous Forms' and select the appropriate 'Address Change' form under the 'Personal Information Changes'.
3. If you enter EXEMPT on line 3b, your exemption from Federal Income Tax withholding expires after February 15th each year. You must complete a new W-4 form with this office between January 1st and February 15th each year to renew this exemption. W-4 IRS Codes require that a copy of your W-4 be sent to the IRS for review if you file an EXEMPT status and earn more than \$200.00 per week.
4. **FOREIGN EMPLOYEE MUST REQUEST A DETERMINATION OF ALIEN TAX LIABILITY FORM FROM THE INTERNATIONAL PROGRAMS OFFICE, ROOM 400 CULBERTSON HALL, (994-4031). YOU MUST THEN MAKE AN APPOINTMENT WITH THE INTERNATIONAL EDUCATION DEPARTMENT IN ORDER TO COMPLETE THIS FORM.**
5. IRS Codes require that a copy of your W-4 be sent to the IRS for review if you claim more than 10 withholding allowances.
6. Montana Tax Codes require that a copy of your W-4 be sent to the State Department of Revenue for review if you claim more than 10 withholding allowances.
7. You may qualify for Earned Income Credit (EIC), a special credit for low-income workers with children. The credit is subtracted from the amount of tax you owe, so you could end up paying less tax.

If you would like different deductions for your state and federal withholding, please fill out two W-4 forms, marking state withholding as "State Only" and federal withholding as "Federal Only".

Employment Eligibility Verification Form – I-9

The Immigration Reform and Control Act of 1986 requires that all new employees and their departments complete the Employment Eligibility Verification Form (I-9). **Please complete Section I and present the acceptable documents to your department manager for Section II verification.** Failure to forward a completed Form I-9 will result in your paycheck being held by the Personnel and Payroll Office.

Selective Service

The Military Selective Service Act, 50 App. U.S.C. 451, et seq, requires **males aged 18 through 26** to register with the Selective Service Administration. In support of this federal regulation, the State of Montana prohibits a state agency or post-secondary educational institution from employing any individual who meets the Selective Service Registration requirement but has failed to register. Effective July 1, 2001, the Montana University System will not employ or provide state financial assistance to any person who is required to register but has not done so. Register at <http://www.sss.gov>.

Direct Deposit

You are encouraged to have your paycheck automatically deposited into your bank account(s). With **Direct Deposit**, your net pay will be deposited in the bank account(s) you choose. You may turn the form into Human Resources. If there is a change in bank services, Human Resources **must** be informed about any changes. By authorizing direct deposit, it will remain in effect until changed in writing or termination of employment at MSU. A paystub will now be available for print out at Employee Service/MYINFO on the campus website. You must be enrolled for Direct Deposit before the **20th** of the month to be in effect for the next payroll.

Campus Crime Report

Copies of the campus crime report are available at: <http://www.montana.edu/police/Clery%202009.shtml>

Questions? Contact the Office of Human Resources at 994-3651