INSTITUTE FOR SOCIAL, BEHAVIORAL AND ECONOMIC RESEARCH

Instructions for Completing Staff & Academic New Hire Employment Forms (Off-Campus)

**All forms must be dated prior to working. Be sure to sign all of them.**

NOTE: Your Employee ID Number will be assigned to you after you have been hired.

PERSONNEL DATA FORM (pages 2-3)
*Complete all applicable information. Complete both pages. Sign on the bottom of the second page.

DEMOGRAPHIC DATA TRANSMITTAL (pages 4-5)
*Indicate ethnicity & race in Sections 1A & 1B.
*If applicable, check the disability status box, and/or any boxes referring to veteran status on the next page.
*Note: This data is for statistical purposes only. The form will be destroyed and will not be part of your personnel file.

STATE OATH OF ALLEGIANCE, PATENT POLICY, AND PATENT ACKNOWLEDGMENT (page 6)
*Sign at the top (“Officer or Employee”) and sign & date at the bottom (“Employee/Guest”) in the presence of a Notary Public. The Notary must sign the top & bottom, as the witness.
*Note: If you are not a US citizen or Permanent Resident, you do not have to sign the Oath of Allegiance (top section). Simply draw a line across the signature area and write “Citizen of ____________“ (name of your country).

*All dates must match and must be prior to (or the same as) the first day of work.

EMPLOYMENT ELIGIBILITY VERIFICATION (I-9 FORM) (pages 7-8)
*Complete the top 1/3 of the form. Be sure to sign and date it.
*See the list of acceptable documents on the following page. You will need to provide the Notary (same person witnessing the Oath/Patent Policy) with original identifying documents, which (s)he will xerox; copies to be included with the packet. The Notary must complete the bottom portion of the form.

UC W-4 FORM (WITHHOLDING ALLOWANCE CERTIFICATE) (pages 9-16)
*Complete all personal information. Use your permanent address, as this is where your W-2 form will be mailed.
*Complete Section I (Federal) & Section II (State) – OR – Section III (Exempt), but NOT BOTH. If you wish to have additional taxes withheld, complete Section IV.
*If you have questions, you will need to seek assistance on your own. We are not authorized to instruct employees on the completion of this form. Be sure to have it completed, signed and dated before returning it.
*Note: It is only necessary to print out the first page of this form (page 9). The remaining worksheets (pp 10-16) are for your reference, and are not to be submitted with the packet of forms. Please only print them if you need them for your records.
*If you are working out of state, you may need to complete an Out-of-State withholding form (UPAY 830); please contact Monica.

PAYROLL & NON-PAYROLL DEPOSIT AUTHORIZATION FORM (page 17)
*This is to have your paycheck directly deposited into a checking or savings account.
*Be sure to attach a voided check in the designated area. If it is for a Savings Account, or if you do not use paper checks, supply a letter from your bank verifying the account number and transit routing number.

STATEMENT RE YOUR EMPLOYMENT IN A UNIV. POSITION NOT COVERED BY SOCIAL SECURITY (page 18)
*Fill in your name and Social Security Number. Sign and date on the bottom of the page. Note: This pertains to Limited employment assignments. If it is determined that it does not pertain to your appointment, the form will be destroyed.

DO NOT BEGIN WORKING UNTIL YOU HAVE COMPLETED THIS PROCESS!