



Human Resources
 19 Montana Hall
 P.O. Box 172520
 Bozeman, MT 59717-2520
 Phone: (406) 994-3651
 Fax: (406) 994-5974

Professional Employee Checklist

Name: _____

FTE: _____

Dept: _____

Employee Type: Professional/Faculty

Appointment Length & Employee Start Date: _____

Please read this packet and complete the required forms to enroll for your benefits. They must be returned to Human Resources within 3 to 30 days of your listed date of hire. Please see below for a list of required forms and the return deadlines. If you do not return the CHOICES form, you will be defaulted into basic coverage.

If you have any questions, please contact Human Resources at 994-3651 or stop by Room 19 Montana Hall for personal assistance. If you are interested in any of the Optional Benefits that are described in this packet or would like additional information about them, please call Human Resources Office.

Required Enrollment Forms

Received

MUST BE IN TO HR WITHIN 3 DAYS OF EMPLOYMENT

- | | | |
|-------|---|-------|
| _____ | 1. W-4 Form | _____ |
| _____ | 2. Employment Eligibility Verification Form (I-9) | _____ |
| _____ | 3. Direct Deposit | _____ |

MUST BE IN TO HR WITHIN 30 DAYS OF EMPLOYMENT

- | | | |
|-------|--|-------|
| _____ | 4. CHOICES Form (Enrollment for Insurance) | _____ |
| _____ | 5. Decedent's Warrant | _____ |
| _____ | 6. Retirement System Information | _____ |
| _____ | 7. Certification of Prior Employment | _____ |
| _____ | 8. Workers' Compensation Subsequent Injury form | _____ |
| _____ | 9. Vehicle Use Agreement | _____ |
| _____ | 10. Employee Declaration of Tax Status of Dependents | _____ |

MUST BE RETURNED TO PLANNING AND ANALYSIS MONTANA HALL ROOM 318

1. Degree History Form

I understand there are optional benefits available to me that require additional forms for my enrollment. If I do not return these optional forms within 30 days from my start date, Human Resources will assume I do not wish to participate in the benefits to which these forms relate and have made a waiver thereof.

For your information, various policies and procedures concerning Professional, Classified, and Faculty employees are listed at <http://www2.montana.edu/policy/personnel>.

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

 Employee Signature Date

Employment Forms

The following pages describe the employment forms and their purpose. The actual forms to be filled out are included. **All forms described must be filled out and returned to the Human Resources office within 31 days of employment.**

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 this document. If you subsequently change your address, you must contact the Human Resources Office to make the change.**
3. If you entered 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. **IF YOU ARE A FOREIGN EMPLOYEE, PLEASE 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. EIC - You may qualify for Earned Income Credit (EIC). The EIC is 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. Contact the Human Resources Office (994-3651).

Employment Eligibility Verification Form – I9

The Immigration Reform and Control Act of 1986 requires that all new employees and their departments complete the Employment Eligibility Verification Form. **Please complete Section I and present to your department 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.

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 or sign up online using the following directions. 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.

Enrolling in direct deposit online use the following steps:

- From MSU website (www.montana.edu), click on MYINFO and follow instructions to sign in.
- Next go to Employee Services
- Click on Pay Information
- Click on Direct Deposit Breakdown
- If you're not enrolled in Direct Deposit, click on Add New Direct Deposit to sign up
- If currently enrolled in Direct Deposit and you want to make changes to your account(s), click on Update Direct Deposit Allocation
- For step-by-step instructions (with screen shots), go to <http://www.montana.edu/hr/Payroll/Direct%20Deposit%20Instructions.pdf>
- Questions? Contact the Human Resources Department at 994-3651
- Must be entered online by the **24th** of the month or in person on paper by the **20th** of the month to be in effect for the next payroll.

Retirement System Information

As a professional employee, you must enroll with the Teachers' Insurance Annuity Association/College Retirement Equity Fund (TIAA/CREF).

TIAA/CREF is a defined contribution retirement plan, which predates your retirement income on the annualized value of your account at the time of retirement. The majority of institutions of higher education in this country have TIAA/CREF retirement systems. Therefore, should you terminate employment at MSU, your TIAA/CREF account can still be used to receive retirement contributions as the result of future employment at most other academic institutions. Under certain circumstances, you may also withdraw or transfer your account value to an IRA Rollover Account at termination.

When complete, the membership form will be forward to TIAA/CREF where an account will be established in your name to receive the tax-deferred salary reductions from your payroll check (7.044 percent) as well as those of MSU (4.956 percent). You will receive a quarterly account statement from TIAA/CREF indicating total contributions and earned interest (TIAA) or current unit value (CREF).

If you are a vested member of the Montana Teachers' Retirement System (TRS) Please contact the Human Resources Office for your additional options.