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](http://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, located in Room 18 Montana Hall or 920 Technology Boulevard, Suite A, 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 MyApps 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](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 – I9**

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 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.

- To enroll in direct deposit online use the following steps:
  - From the MSU website http://www.montana.edu, click ‘MYINFO’ and sign in. Next go to ‘Employee Services’
  - Click on ‘Pay Information’, then 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 'Update Direct Deposit Allocation'
  - For step by step instructions (with screen shots), go to http://www.montana.edu/hr and click on the ‘Payroll’ option under the ‘Benefits and Payroll’ menu, then select ‘Direct Deposit-My Info-Instructions’ under the ‘Direct Deposit’ heading.
  - You must be enrolled for Direct Deposit online by the 24th of the month or by paper form 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