

## New Staff Records Session Checklist

Please use this checklist as a guide when completing the forms required to process your employment and payroll. Check off each form as you complete it to ensure that you have completed all required forms. Bring this checklist along with the required forms (**including all Payroll Forms**)/ identification documents to your Records and Benefits session at the Office of Human Resources.

**\*Intermittent and Non-Continuing Appointment (NSLA)** staff, please give this checklist along with all required forms to your supervisor.

\_\_\_\_\_ **New Employee Data Form** - Used to load your employment and payroll information into the University's computer system.

- The **Emergency Contact** – Who you would like us to call in case of an emergency.
- **State of Birth** should be the state where you were born
- Your **Social Security Number** is required on this document

\_\_\_\_\_ **Form I-9** – Used to document that you are authorized to work in the United States. You will need to establish your identity and employment authorization by **bringing unexpired documents with you to your records and benefits session**. Note: For a list of qualifying documents, see page 5 of Form I-9.

\_\_\_\_\_ **Prior State Service Eligibility form – (For Administrative and Classified Staff Only)** Used to determine if other sick and/or vacation leave balances accrued from other State of Ohio agencies are eligible for transfer to BGSU.

\_\_\_\_\_ **Policy Acknowledgement** – Used to document that you received information on certain BGSU and governmental policies.

- Sign and date the acknowledgement page

\_\_\_\_\_ **Name Change Request form – (As Needed)** If you were loaded in BGSU's computer system as a student or job applicant under another name and your name has changed, you will need to complete this form.

\_\_\_\_\_ **Ohio IT4 form** – Used to document the number of exemptions for your State Income Tax.

- Your school district number corresponds to the city in which you reside (i.e., if you live in Bowling Green, your school district is Bowling Green City). To locate your school district number, please visit [https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/default\\_schooldistrict.aspx](https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/default_schooldistrict.aspx)
- Please cut the form at the perforation and bring only the bottom portion of the form with you to your orientation session

\_\_\_\_\_ **W4**form – Used to document the number of exemptions for your Federal Income Tax.

- Please complete and detach the top of the form for your records

\_\_\_\_\_ **Resident Municipality Withholding** form – **(As Needed)** Used to document municipal withholding.

\_\_\_\_\_ **Direct Deposit Authorization** form – Used to authorize BGSU to deposit your paycheck into an approved bank checking or savings account.

- Please bring a voided check to verify the nine digit federal routing number

\_\_\_\_\_ **OPERS Personal History Record** – Used to document personal data, BGSU employment data, and prior service information with the State of Ohio.

- Make certain your date of birth and social security number are correct
- Complete sections 1-4 only. BGSU Completes Section 5

\_\_\_\_\_ **SSA-1945** – Used to document that you received information about the Windfall Elimination Provision and the Government Pension Offset Provision and the possible effects on your potential future Social Security benefits.