Help with Onboarding Forms

Office of Human Resources
Onboarding Forms Checklist

1. Tell us about yourself
   Complete your demographic and biographical employee record.

2. Complete your W-4

3. Specify your payroll deposit account
   Have your checking account information ready. All UD paychecks are directly deposited to your bank account.

4. Select your additional tax withholdings
   Optional

5. Bayh-Dole Act

6. Voluntary Self-Identification of Disability
   Optional

7. I-9 Form

Questions about forms:
• Contact HR at 302-831-2171

LOG OUT
Important! To protect your personal information, be sure to log out and close your web browser when you are done accessing services that require authentication.
Tell Us about Yourself
Employee Demographic Data (EDD)

**ADDRESSES**
- Do not abbreviate address names
- Spell out names like “Street, Road, North, Second”, etc.

**CONTACT INFORMATION**
- **Work phone** - if unknown, enter 302-831-0000
- **UD Directory Indicator** – choose how your contact info will display in UD’s online directory
- **Emergency contact name** – type the last name, then first name

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**PERMANENT ADDRESS** (or Home Country Address for International Employees)

**MAILING ADDRESS** (Local address, if not the same as permanent address)

**CONTACT INFORMATION**

**Home phone:** 

**Work phone:** 302-831-0000

**Cell phone:**

**UD Directory Indicator:** Choose one

**Emergency contact name:** Last Name, First Name

**Emergency contact phone(s):**

**Relationship:** Choose one

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UPDATE MY STUDENT RECORD (applicable to staff who also have a record in UDIS)

☐ Update my name in the student records system with my name as shown above.
Referral source
• Choose the answer that best describes how you learned about this UD position
• If unsure, choose “Other”
**Education level**
- This section is required, you must fill-in both boxes.
- **Highest education level** – use the list to choose your highest level.
  - HS is “high school”
- **School type** – choose one, if neither applies, choose “Undergrad (UNG)”

**Manage Education**
- If you have no degrees above high school, skip this section, it is optional.
- The red asterisks * can be ignored.
Manage Education – Entering Degrees (optional):
• **Action** – click the **Add a degree** radio button
• **Degree** – if your specific degree is not in the list, choose the closest equivalent
• **Major** - if your exact major is not in the list, choose one that is closest to your major
• **Institution code** – use the lookup to find your institution, skip this field if it is not available
• **Date acquired** – if you don’t have the exact date, enter your best estimate

- Click the **Submit** button to enter another degree
- Repeat the steps for any additional degree(s)
- When finished entering degrees, click **Next step**
EDD — Languages (optional)

Manage Languages
• Language information is optional
• To skip this screen, click the Next step button

Employee Demographic Data
If you have any questions, please contact Payroll & Systems Administration at (302) 831-8877 or e-mail hrsystemsadmin@udel.edu.

Symbol Key: * Required Information, ≠ Changed Information

Manage Languages for Prince, Diana (optional)

Faculty and UD experts are encouraged to complete this page but may continue by leaving the page blank and clicking "Next step" at the bottom of the page.

View languages currently on record

Action:
- Add a language
- Edit a language (use lookup to select a language to edit)
- Delete a language (use lookup to select a language to delete)

Language: Choose one

Speak: (none)
Read: (none)
Write: (none)
Native: Choose one
Translator: Choose one

Submit Clear form
EDD – Keywords (optional)

**Employee Demographic Data**
If you have any questions, please contact Payroll & Systems Administration at (302) 831-8677 or e-mail hrsystemsadmin@udel.edu.

Symbol Key: ★ Required Information, ▶ Changed Information

Add Keywords for Prince, Diana (optional)

Faculty and UD experts are encouraged to complete this page but may continue by leaving the page blank and clicking "Next step" at the bottom of the page.

Keywords are single words which, when combined, describe the employee's expertise or area of research.

- View keywords currently on record
  - Add a keyword
  - Edit a keyword (use lookup to select a keyword to edit)
  - Delete a keyword (use lookup to select a keyword to delete)

Keyword: 
If not listed, enter the Keyword: 
Submit  Gear form

Add Keywords
- Optional – add keywords in your area of expertise.
- To skip this screen, click the Next step button
EDD – Experts@UD information (optional)

**Experts@UD information**
- Optional – add more details about your research, career, etc.
- Choose if/when you are willing to speak to the media about your areas of expertise.

To skip this screen, click the **Next step** button.
Skip the Routing and Authorization section, this is for internal use only.

Click the Finish & submit button.
W-4 Form – U.S. Citizens
Determines your federal and state payroll taxes

State exemptions:
- You must enter a number in State of DE box, regardless of the state you live in.
- If you live in Maryland, enter a number in the State of MD box.
- Leave State of MD blank if you do not live in Maryland.
- If you live in a state other than Delaware or Maryland, your home state taxes are handled when you file your state tax return.

Enter no. of exemptions:
- 1. SINGLE line
  OR
- 2. MARRIED line
  NOT both

Enter exemptions in lines 3 – 5, only if they apply to you.
W-4 Form (cont’d) — Non-U.S. Citizens

Determines your federal and state payroll taxes

If you are not a U.S. Citizen, you must enter 1 for Federal and State of DE boxes on the SINGLE line, even if you are married.

Do not enter anything in lines 2 – 5.
**W-4 Form (cont’d) — Wilmington Tax**

Select **Yes**, if you live or work within the city limits of Wilmington, DE.

### Wilmington zip codes subject Wilmington Tax to include:

- 19801 (all)
- 19802 (all)
- 19803 (#1700-1704 Augustine Cutoff only)
- 19805 (partial)
- 19806 (most)
- 19807 (very small parts)

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**Tax Information**

<table>
<thead>
<tr>
<th>No.</th>
<th>Exemption</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>IF SINGLE, and you claim an exemption, choose between 1 and 99. If you claim no exemptions, choose “0”.</td>
</tr>
<tr>
<td>2.</td>
<td>IF MARRIED, each exemption for husband and wife if not claimed on another certificate. (a) If you claim exemptions, choose between 1 and 99. (b) If you claim no exemptions, choose “0”.</td>
</tr>
<tr>
<td>3.</td>
<td>Exemptions for age and blindness. (applicable only to you and your spouse but not dependent(s)): (a) If you or your spouse will be 65 years of age or older at the end of the year, and you claim the exemption, choose “1”. (b) If you or your spouse are blind, and you claim the exemption, choose “1”, if both are blind, and you claim both exemptions, choose “2”.</td>
</tr>
<tr>
<td>4.</td>
<td>If you claim exemptions for one or more dependents, provide the number of such exemptions (1 if dependent unless you are qualified under existing regulations).</td>
</tr>
<tr>
<td>5.</td>
<td>Allowances for itemized deductions. (This allowance is used solely for the purpose of figuring your withholding tax, and cannot be claimed when you file your tax return).</td>
</tr>
</tbody>
</table>

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**Wilmington Tax:***

- **Resident:** No
- **Works in City Limits:** No
Certification:
• Choose “I agree”
• Type your name exactly how it appears at the top of the screen

Skip the Routing and Authorization section and click Finish & submit
Direct Deposit

UD requires employees to have a bank account and direct deposit of pay.
(If you do not have a bank account yet, do not submit this form.)
Direct Deposit (cont’d)

You will enter the Routing and Account Numbers on the direct deposit form.

Complete this form and submit bank account documentation by one of these methods:
- Upload your bank account information with this form
- OR bring account information to your initial onboarding appointment.

Documentation suggestions:
- Voided check
- Screen print of your bank account info
- Letter from your bank
- Digital photo of one of these documents

Documentation must include both your account number and the bank’s routing number.
Local Bank

Open a PNC bank account at their office in the Trabant University Center.

PNC has several ATMs on the Newark campus.
Enter the amount of additional federal or state tax you want withheld from your pay. This form only allows extra withholding for Delaware and Maryland state income taxes.

Skip the Routing and Authorization section and click Finish & submit.
This form acknowledges that, as a UD employee, you are assigning to the University of Delaware any discovery, invention or algorithm that you conceive while working on federally funded research or other sponsored projects.

You further acknowledge your understanding that you will share in any revenues from such inventions as described in the University policy called Intellectual Property Protection, Ownership, and Commercialization.
Voluntary Self-Identification of Disability Form

This form is optional. If applicable to you, please complete this short form and read the related information available with this link.

[Image of form]

[Submit button]
**Bring originals of your acceptable documents to your onboarding appointment:**
- One document from **List A**
- One from **List B** and one from **List C**

### List A: Documents that Establish Both Identity and Employment Authorization
1. U.S. Passport or U.S. Passport Card
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa
4. Employment Authorization Document that contains a photograph (Form I-766)
5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status:
   - Foreign passport, and
   - Form I-94 or Form I-94A that has the following:
     1. The same name as the passport
     2. An endorsement of the alien’s nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI

### List B: Documents that Establish Identity
1. Driver’s license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
3. School ID card with a photograph
4. Voter’s registration card
5. U.S. Military card or draft record
6. Military dependent’s ID card
7. U.S. Coast Guard Merchant Mariner Card
8. Native American tribal document
9. Driver’s license issued by a Canadian government authority

For persons under age 18 who are unable to present a document listed above:
10. School record or report card
11. Clinic, doctor, or hospital record
12. Day-care or nursery school record

### List C: Documents that Establish Employment Authorization
1. A Social Security Account Number card, unless the card includes one of the following restrictions:
   - (1) NOT VALID FOR EMPLOYMENT
   - (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION
   - (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION
2. Certification of birth issued by the Department of State (Form DS-1350, FS-545, FS-240)
3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal
4. Native American tribal document
5. U.S. Citizen ID Card (Form I-157)
6. Identification Card for Use of Resident Citizen in the United States (Form I-179)
7. Employment authorization document issued by the Department of Homeland Security

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www.uscis.gov/i-9
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Select your additional tax withholdings
Optional

Bayh-Dole Act

Voluntary Self-Identification of Disability
Optional

I-9 Form

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## Onboarding Appointment Reminders

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<th>Bring to appointment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Complete all required Onboarding Forms</td>
<td>• I-9 Form documentation (originals)</td>
</tr>
<tr>
<td></td>
<td>• Direct Deposit documentation</td>
</tr>
</tbody>
</table>
Questions?
Contact Office of Human Resources
302-831-2171