Help with Onboarding Forms
For New Employees

Human Resources
Onboarding Forms Menu

1. UD Bio
   - Provide your personal information, so we can match you with any prior records in our systems and assign your UD ID.

2. My UD Settings
   - Create your UD email account and set-up two-factor authentication (2FA).

3. Employee Demographic Data
   - Log in to UD Web Forms to provide information for Human Resources records.

4. Direct Deposit
   - Log in to UD Web Forms to specify your payroll deposit account. Have your checking account information ready. All UD paychecks are directly deposited to your bank account.

5. W-4
   - Log in to UD Web Forms to complete a W-4 tax form.

6. Bayh-Dole Agreement
   - Log in to UD Web Forms to agree to the assignment of intellectual property and compliance with the Bayh-Dole Act.

7. Voluntary Self-identification of Disability (optional)
   - Visit the HR website to submit a Voluntary Self-identification of Disability Form and/or learn more about accommodations.

8. I-9
   - Please look for an email from DoNotReply@talentwise.com prior to your appointment to start the Form I-9, Section 1. Here is an instructional video available to guide you through this process. *Please remember to bring your original IDs to your in-person appointment.

   Email with a link to the I-9 after you clear the Criminal Background Check.

This form is optional.
# UD Bio

Provide your personal information, so we can match you with any prior records in our systems and assign your UD ID. Your UD ID is a unique 5- or 9-digit number that identifies you, whether you’re a student, employee, UD alumnus or alumna, or former UD student. Every employee and student is assigned a UD ID. If you have questions, contact Human Resources at (302) 831-2171 or email hr-onboard@udel.edu.

Symbol key: Required information, Error

## Full name

Provide your full legal name.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full first name</td>
<td>Buzz</td>
</tr>
<tr>
<td>Middle name</td>
<td>Aldrin</td>
</tr>
<tr>
<td>Full last name</td>
<td>Lightyear</td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
</tr>
<tr>
<td>Have you ever had a name change?</td>
<td>No</td>
</tr>
</tbody>
</table>

## Identifying information

We understand how important your personal information, including social security number, is to you. We request your social security number on our application for a variety of identity purposes (including need-based financial aid and required government reporting) and assure you that we will maintain it with the utmost confidentiality and security. It will no longer be used as a student identifier on any UD material.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security Number (SSN):</td>
<td>000-00-0339</td>
</tr>
<tr>
<td>Date of birth</td>
<td>11/22/1995</td>
</tr>
</tbody>
</table>
My UD Settings

Account creation: Lightyear, Buzz (000000000)

Step 1 of 6

If you have questions, contact Human Resources at (302) 831-2171 or email hr-onboard@udel.edu

Symbol key: ⚫ Required information, ▲ Error

UDelNet ID settings

Your UDelNet ID is your username. You will use it with your password to log in to University of Delaware secure online services.

Your UDelNet ID is also the first half of your University of Delaware email address. All official University correspondence is sent to your UD email address.

Choose a UDelNet ID: ⚫ buzz

3-8 lowercase letters (no spaces, numbers, or punctuation marks)

Next step ➔
Employee Demographic Data (EDD)
US Citizen/Permanent Resident

Are you a US Citizen or Permanent Resident? YES
• Enter your permanent address

Addresses
• Do not abbreviate address names
• Spell out names like “Street, Road, North, Second”, etc.
Employee Demographic Data (EDD)
Non-US Citizen

Are you a US Citizen or Permanent Resident?  NO
- Enter your permanent home country address
- Enter your local address

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

Error Message
- If you are not a US Citizen or Permanent Resident, you will see this error message if you select United States.
### EDD – Contact Information

**CONTACT INFORMATION**

- **Campus phone** if unknown, enter 302-831-0000

- **UD Directory Indicator** – how your contact info will display in UD’s online directory

- **Emergency contact name** – type the last name, then first name

**Contact Information Form**

- **Home phone:** 302-555-1111
  - (US use format nnn-nnn-nnnn)

- **Cell phone:** 302-555-2222
  - (US use format nnn-nnn-nnnn)

- **Campus phone:**
  - This number will be used for directory purposes. Please provide a work number even if it is not considered a campus phone.
  - 302-831-0000

- **UD Directory Listing:** Choose one

- **Emergency contact name:** Pride, Woody
  - (use format Last Name, First Name)

- **Emergency contact phone(s):** 302-555-3333
  - Choose one
**Education**
- This section is required
- **Highest education level**
  - HS = high school
- **School type** – if neither applies, choose “Undergrad (UNG)”

**Degree, Major, Institution, Date acquired**
- If you have no degrees above high school, skip this section, it is **optional**.
Entering Degrees (optional):
• 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
• Date acquired – if you don’t have the exact date, enter your best estimate

• Click the Save button to enter another degree
• Repeat the steps for any additional degree(s)
### EDD – Languages

**Languages**

- Language information is **optional**

---

**Languages**

Faculty and UD experts are encouraged to complete this section but may continue by leaving the section blank.

<table>
<thead>
<tr>
<th>Language</th>
<th>Speak</th>
<th>Read</th>
<th>Write</th>
<th>Native</th>
<th>Translator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polish (PH)</td>
<td>Low (1)</td>
<td>Low (1)</td>
<td>Low (1)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Choose one</td>
<td>(none)</td>
<td>(none)</td>
<td>(none)</td>
<td>Choose one</td>
<td>Choose one</td>
</tr>
</tbody>
</table>

[Save button]
EDD – Keywords

Keywords
- Optional – add keywords in your area of expertise.
- Phrases must be entered with no spaces, for example:
  - Solar power should be typed as “SOLARPOWER”

Keywords are single words which, when combined, describe the employee's expertise or area of research. Faculty and UD experts are encouraged to complete this section.

Keyword
- SOLARPOWER

Action
- Save

Please enter first 3 characters of word to search for or enter a new single keyword.
EDD – Certification

Certification
• Click the certification box
• Enter your First and Last names to certify the information you provided
• Click the Next step button
### EDD – Routing

<table>
<thead>
<tr>
<th>Form Originator</th>
<th>Lightyear,Buzz</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approver</td>
<td>HR SA</td>
</tr>
<tr>
<td>Copy</td>
<td>Lightyear,Buzz</td>
</tr>
<tr>
<td>Copy</td>
<td>HR PS</td>
</tr>
</tbody>
</table>

**Date:** 2017-12-06

- **Previous step**
- **Exit without saving**
- **Save & exit (not submitted)**
- **Finish & submit**
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.)

Re-hired employee - will see historical direct deposit information. Enter your current bank account information.
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:
- Upload your bank account information with this form

Documentation suggestions:
- Voided check
- Savings statement
- Screen shot of app or website
- Official bank letter

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.
W-4 Form **U.S. Citizens**
Federal Withholding - Step 1

**Choose your Federal Filing status:**
- Single
- Married
- Head of household

**U.S. citizen or permanent resident?**
- Choose Yes

**Claiming Exemption for withholding?**
- Usually No
W-4 Form U.S. Citizens
Federal Withholding - Steps 2, 3 and 4

Step 2: Multiple jobs or spouse works - this area provides resources if you have these tax situations.

Step 3: Claim dependents - this area walks you through the dependent calculations.

Step 4: Other adjustments - this area is optional and allows you to include other income, additional deductions and extra withholding if appropriate.
W-4 Form Non-U.S. Citizens
Federal Withholding - Step 1

U.S. citizen or permanent resident?
• Choose No

Provide your tax residency country
• Select your country from the list

Are you a Nonresident Alien for federal tax purposes?
• See linked instructions (Notice 1392)

If you are not a U.S. Citizen, you must choose Single for Federal filing status, even if you are married.
W-4 Form Non-U.S. Citizens
Federal Withholding - Steps 2, 3 and 4

Step 2: Multiple jobs or spouse works – ignore this section, it does not apply to non-U.S. citizens.

Step 3: Claim dependents - this area walks you through the dependent calculations.

Step 4: Other adjustments - this area is optional and allows you to include extra withholding if appropriate. The other two adjustments do not apply.
W-4 Form U.S. Citizens & Non-U.S. Citizens
State Tax Withholding

**Tax information** - this area allows you to enter a state (other than Delaware) where you work or reside.

**Note** – if you reside in Maryland or Pennsylvania, you have additional tax withholding options.

Choose your **State of DE filing status**:
- Single or Married filing separately
- Married filing jointly

Enter your **DE withholding allowances**:
- U.S. citizens: enter any number
- Non-resident aliens: enter 1

**DE additional amount withheld**:
- Enter extra withholding if desired.
W-4 Form U.S. Citizens & Non-U.S. Citizens

Wilmington Tax

To determine if you live or work in Wilmington city limits, please see [https://www.wilmingtonde.gov/home/showdocument?id=452](https://www.wilmingtonde.gov/home/showdocument?id=452).

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

Use this link to verify if you have a Wilmington tax obligation.
E-signature and Routing

**E-signature:**
Type your name exactly how it appears below the name boxes.

**Comments:**
Enter additional information if desired.

**Attachment(s):**
Use the **Browse** and **Attach** buttons to add documentation as needed.

Click **Finish & submit**
Bayh-Dole Agreement

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.
Form I-9

You will receive an email from Sterling with a link to the digital Form I-9.

Links to videos:

I-9: Completing Section 1
I-9: Completing Section 1 – Remote Employees
Log in to the UD Web Forms systems to specify your payroll direct deposit account. Have your checking account information ready. All UD paychecks are directly deposited to your bank account.

Employee Demographic Data
Log in to the UD Web Forms to provide information for Human Resources records.

W-4
Log in to the UD Web Forms to complete a W-4 tax form.

Bayh-Dole Agreement
Log in to UD Web Forms to agree to the assignment of intellectual property and compliance with the Bayh-Dole Act.

Voluntary Self-identification of Disability (optional)
Visit the HR website to submit a Voluntary Self-identification of Disability Form and/or learn more about accommodations.

I-9
Please look for an email from DoNotReply@talentwise.com prior to your appointment to start the digital Form I-9, Section 1. Here is an instructional video available to guide you through this process.
*Please remember to bring your original IDs to your in-person appointment.
Onboarding Appointment Reminders
for Benefited Employees &
Graduate Students On-Contact

<table>
<thead>
<tr>
<th>Prior to appointment</th>
<th>I-9 Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Complete all required Onboarding Forms</td>
<td>• Complete Section 1 of digital I-9</td>
</tr>
<tr>
<td></td>
<td>• Bring <em>original</em> I-9 documentation</td>
</tr>
</tbody>
</table>
Onboarding with Your Department
for Other Employees
(Misc. Wage, Student Labor, Adjuncts)

<table>
<thead>
<tr>
<th>Prior to appointment</th>
<th>I-9 Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Complete all required Onboarding Forms</td>
<td>• Complete Section 1 of digital I-9</td>
</tr>
<tr>
<td></td>
<td>• Bring <em>original</em> I-9 documentation</td>
</tr>
</tbody>
</table>
Questions?
Contact Human Resources
hr-onboard@udel.edu