Help with Onboarding Forms

Human Resources
Onboarding Forms Checklist

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

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

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**
   - I9 forms will be completed remotely. Review page 3 of the I-9 form for a list of eligible verification documents. Selected documents should be with you during your onboarding appointment.

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The I-9 is not an electronic form. You will print it then complete and sign it at your onboarding appointment.
Enter your given name and choose yes or no if you ever had a name change.

Complete “Former name” section only if it applies to you.
Complete all fields with asterisks next to them.

Information about why we ask for your SSN.

Click on the “I’m not a robot” before clicking on “Next step”
Choose your UDelNetID; this is your username. This allows you to set-up your:

- UD email
- Password
- Two-factor Authentication (2FA)
- Security questions
UD requires employees to have a U.S. bank account and direct deposit of pay. (If you do not have a bank account yet, do not submit this form.)

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**Form Originator**

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<thead>
<tr>
<th>Originated by:</th>
<th>Flintstone, Fred</th>
</tr>
</thead>
<tbody>
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**Other forms submitted for this employee**

<table>
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<th>Form title</th>
<th>Originator</th>
<th>Originating location (network)</th>
<th>Last action date</th>
<th>Status</th>
</tr>
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</table>

**Direct deposit information**

Indicate up to 20 bank accounts in which to deposit your pay. One account must have Deposit type equal to “Balance of Net Pay”. Up to 19 optional accounts may be added and must have Deposit type equal to “By Amount” and include a fixed deposit amount.

Please have a check in front of you and use this example to locate the information required below.
Complete this form and submit bank account documentation:
• Upload your bank account information with this form

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.
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)

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.
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
EDD – Education

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)
Languages
• Language information is optional

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<th>Speak</th>
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<th>Write</th>
<th>Native</th>
<th>Translator</th>
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<td>LOW (1)</td>
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<td>No</td>
<td></td>
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<tr>
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<td>(none)</td>
<td>(none)</td>
<td>(none)</td>
<td>Choose one</td>
<td>Save</td>
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</table>
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”
EDD – Certification

Certification
- Click the certification box
- Enter your First and Last names to certify the information you provided
- Click the Next step button

Certification:
By entering my name below, I acknowledge that the information provided in this form is true, accurate, and complete to the best of my knowledge.

E-signature:
First: Fred
Last: Flintstone
(type Fred) (type Flintstone)

Next step button
### EDD – Routing

<table>
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<th>Form Originator</th>
<th>Approver</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>Flintstone,Fred</td>
<td>HR SA</td>
<td>2017-12-06</td>
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<tr>
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<td>HR PS</td>
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[Image of the EDD Routing screen]
W-4 Form – U.S. Citizens
Determines your federal and state payroll taxes

Enter no. of exemptions:
• 1. SINGLE line
• 2. MARRIED line
• 3. Choose the “Head of Household” only if it is applicable
If you are a non-U.S. citizen, two new fields will appear. Choose your tax residency country, and answer yes or no if you are a nonresident alien.
W-4 Form (Steps 2 - 3)
Determines your federal and state payroll taxes

Step 2: Multiple jobs or spouse works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following:

(a) Use the estimator at www.irs.gov/W4App for most accurate withholding; or
(b) Use the Multiple Jobs Worksheet and enter the result in Step 4(c) below for roughly accurate withholding; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Step 3: Claim dependents

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by $2,000:

Multiply the number of other dependents by $500:

Total for the amounts above:

Steps 2 – 3 should only be completed if they apply to you, otherwise skip these sections.
Step 4 should only be completed if it applies to you, otherwise skip it.
For non-U.S. citizens, choose single and 1 under “State of Delaware”.

W-4 Form (State and Wilmington Taxes)
W-4 Form (Your E-signature)

Type your first and last names in the **Sign here** section, this is your **E-signature**.

Skip the **Routing** section and 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.
The I-9 is not an electronic form. You will print it, then complete and sign it at your onboarding appointment.

Bring originals of your acceptable documents to your onboarding appointment:

- One document from List A
- One from List B and one from List C

www.uscis.gov/i-9
Log in to the UD Web Forms to specify your payroll direct deposit account. Have your checking account information ready. All UD paychecks are directly deposited to your bank account.

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

Select documents should be with you during your onboarding appointment.

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

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

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

I-9 forms will be completed remotely. Review page 3 of the I-9 form for a list of the eligible verification documents. Selected documents should be with you during your onboarding appointment.
## Onboarding Appointment Reminders

<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>• Will be completed during appt.</td>
</tr>
<tr>
<td></td>
<td>• Review page 3 for list of eligible verification documents</td>
</tr>
</tbody>
</table>
Questions?
Contact Human Resources
302-831-1533
hr-onboard@udel.edu