Help with Onboarding Forms

Office of Human Resources
Onboarding Forms Checklist

Human Resources

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

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)

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.

- Permanent address (or home country address for international employees)
  - United States (USA)
- Address line 1
  - 123 Anywhere Street
- Address line 2
- City
  - Newark
- State or province
  - Delaware
- ZIP or postal code (required for USA only)
  - 19713
Tell Us about Yourself
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.
Complete the following steps to configure your mobile app.

**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
**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

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>
<th>Action</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>
<td>Remove</td>
</tr>
<tr>
<td>1.</td>
<td>Choose one</td>
<td>(none)</td>
<td>(none)</td>
<td>(none)</td>
<td>Choose one</td>
<td>Choose one</td>
</tr>
</tbody>
</table>

2.
EDD – Keywords

Keywords
- Optional – add keywords in your area of expertise.

<table>
<thead>
<tr>
<th>Keyword</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAFETY</td>
<td><img src="logo.png" alt="Save" /></td>
</tr>
</tbody>
</table>

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.

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

Certification: ✗
E-signature: ✗

First: Fred
Last: Flintstone

(type Fred) (type Flintstone)

Exit without saving  Save & exit (not submitted)  Next step
EDD – Routing
W-4 Form – U.S. Citizens
Determines your federal and state payroll taxes

Enter no. of exemptions:

- **1. SINGLE line**
- **2. MARRIED line**
- **NOT both**

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 DE or MD, check with your state about how your state taxes are paid.

Enter exemptions in lines 3 – 5, only if they apply to you.
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

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)

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

Certification: I understand my University of Delaware net pay will be deposited to my designated account(s) so the funds are available to me on the day of pay. In the event funds to which I am not entitled are deposited to my account(s), I hereby authorize the University of Delaware to direct the bank to return said funds. Direct deposit of my net pay as requested above will remain in effect until my employment with the University of Delaware is terminated. The University of Delaware may terminate this service at any time.
Local Bank

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

PNC has several ATMs on the Newark campus.
Additional Tax Withheld (optional)

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.
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.

Assignment of Intellectual Property and Compliance with the Bayh-Dole Act

Under the terms of the Bayh-Dole Act, a federal statute, University employees who engage in federally funded research must disclose inventions that have been conceived or first actually reduced to practice in connection with their work at the University. This disclosure must be in writing so that the University can file patent applications on such inventions*. The University's intellectual property policy, Number 6-6, requires the cooperation of the inventors to define and establish rights to the invention and to make an assignment to the University of inventions and discoveries, which are and may be patentable. Most third party funding agreements also require written assignment agreements from individuals engaged in funded research.

The attached “Agreement to Assign” covers any invention that is conceived or reduced to practice in sponsored project activities at the University. Sponsored projects include activities and salaries that are supported in whole or in part by the federal government or by any other internal or external funding source or are conducted in University facilities. You are asked to sign the Agreement as a new employee. Included in this category of employees are full time faculty, full and part time professional and salaried staff, postdoctoral and research fellows, graduate students who receive stipend and visiting researchers. Signed forms should be returned to Anna Bloch, Office of Human Resources, 413 Academy Street, Room 268. Should you have additional questions about the University’s intellectual property policy or compliance with the Bayh Dole Act, please contact Sean Hayes at 302-831-7445.

We appreciate your cooperation in assuring that the University of Delaware is in compliance with federal law and regulation.


Agreement to Assign

As a condition of my appointment/employment or continued appointment/employment by the University of Delaware (“University”), I agree to report promptly to the University Office of the Vice Provost for Research any discovery, invention or algorithm that I may conceive or first reduce to practice in the course of sponsored projects at the University (“Invention”).

Sponsored projects include activities and salaries that are supported in whole or in part by the federal government or by any other internal or external funding source or are conducted without such funding in University facilities. I further agree to assign, and do hereby assign, to the University all my rights, title, and interest in any Invention and to render such assistance as the University reasonably requests to enable the University to obtain patents and develop the commercial value of such inventions.

By entering my name below, I acknowledge my understanding that I will share in any revenues from such inventions as described in the University’s Policy on Inventions, Discoveries and Patents, as it may be amended from time to time.

Employee name: * First name: Fred Last name: Flintstone
This form is optional. If applicable to you, please complete this short form and read the related information available with this link.
Bring originals of your acceptable documents to your onboarding appointment:
• One document from List A
OR
• One from List B and one from List C

**LISTS OF ACCEPTABLE DOCUMENTS**
All documents must be UNEXPIRED

Employees may present one selection from List A or a combination of one selection from List B and one selection from List C.

<table>
<thead>
<tr>
<th>LIST A</th>
<th>Documents that Establish Both Identity and Employment Authorization</th>
<th>OR</th>
<th>LIST B</th>
<th>Documents that Establish Identity</th>
<th>AND</th>
<th>LIST C</th>
<th>Documents that Establish Employment Authorization</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. U.S. Passport or U.S. Passport Card</td>
<td></td>
<td></td>
<td>1. Driver’s license or ID card issued by a State or city indicating possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</td>
<td></td>
<td>1. A Social Security Number card, unless the card includes one of the following restrictions:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)</td>
<td></td>
<td></td>
<td>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</td>
<td>(1) NOT VALID FOR EMPLOYMENT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa</td>
<td></td>
<td></td>
<td>3. School ID card with a photograph</td>
<td>(2) VALID FOR WORK ONLY WITH INS AUTHORIZATION</td>
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<tr>
<td>4. Employment Authorization Document that contains a photograph (Form I-766)</td>
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<td></td>
<td>4. Voter’s registration card</td>
<td>(3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION</td>
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<tr>
<td>5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status:</td>
<td></td>
<td></td>
<td>5. U.S. Military card or draft record</td>
<td>2. Certification of birth issued by the Department of State (Form DS-1350, FS-545, FS-240)</td>
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<tr>
<td>a. Foreign passport; and</td>
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<td>6. Military dependent’s ID card</td>
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<tr>
<td>b. Form I-94 or Form I-94A that has the following:</td>
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<td>7. U.S. Coast Guard Merchant Mariner Card</td>
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<tr>
<td>(1) The same name as the passport; and</td>
<td></td>
<td></td>
<td>8. Native American tribal document</td>
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</tr>
<tr>
<td>(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</td>
<td></td>
<td></td>
<td>9. Driver’s license issued by a Canadian government authority</td>
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<tr>
<td>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</td>
<td></td>
<td></td>
<td>7. Employment authorization document issued by the Department of Homeland Security</td>
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<tr>
<td>7.</td>
<td></td>
<td></td>
<td>10. School record or report card</td>
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<tr>
<td>8.</td>
<td></td>
<td></td>
<td>11. Clinic, doctor, or hospital record</td>
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<tr>
<td>9.</td>
<td></td>
<td></td>
<td>12. Day-care or nursery school record</td>
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</table>

[www.uscis.gov/i-9](www.uscis.gov/i-9)
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- **I-9 Form**

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## Onboarding Appointment Reminders

<table>
<thead>
<tr>
<th>Prior to appointment</th>
<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