



SMU | HUMAN
RESOURCES

**HIRING PROCEDURES
FOR
NEW STUDENT
EMPLOYEE**



New Student Employee Checklist

Employee Name: _____ SMU ID #: _____
If you don't have an SMU ID, HR will assign one.

Start Date: _____

Complete the following steps on or prior to your first day of work:

- **Schedule an appointment** to visit the Department of Human Resources on or prior to your first day of work to complete the *Form I-9* and present documents to a HR representative that establish identity and work authorization.
 - The list of acceptable documents to complete the *Form I-9* is on the following page. Please bring your documents with you and remember that **all documents must be originals (copies are not accepted) and unexpired.**
 - To schedule appointment please visit <https://booking.smu.edu/appointments/I-9>. HR is on east campus, in the Expressway Tower, located at 6116 N. Central Expressway, 2nd floor, Suite 200, Dallas, TX, 75206. For questions or directions call 214-768-3311. [Location and parking information.](#)
 - SMU is required by federal law to complete an Employment Verification Form (Form I-9) for all employees. Please note that the federal government may impose civil penalties on SMU when a new employee has not completed the Form I-9 appropriately. See www.uscis.gov for further details.

. **Bring this New Student Employee Checklist with you to HR.** Complete your name and start date at the top.

(HR USE Only)		
New Employee Paperwork	Date Submitted to HR	HR Representative's Signature
<input type="checkbox"/> Form I-9		

After you've completed new employee processing:

- Check with your department to ensure that they've submitted a Payroll Authorization Form (PAF) to Payroll for processing. Payroll will enter your new job data.
- Payroll must enter your job data before you can complete the following items:
 - Submit your **Direct Deposit Enrollment and W-4 Elections** via my.SMU.edu (See instructions within this packet). Questions? Call payroll at 214-768-2073

IMPORTANT: Show this form to your supervisor after you've completed the required new employee processing. This checklist is for your records only.

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.

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity	AND	LIST C Documents that Establish Employment Authorization
<ol style="list-style-type: none"> 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: <ol style="list-style-type: none"> a. Foreign passport; and b. Form I-94 or Form I-94A that has the following: <ol style="list-style-type: none"> (1) The same name as the passport; and (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 	OR	<ol style="list-style-type: none"> 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 <li style="text-align: center;">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 	AND	<ol style="list-style-type: none"> 1. A Social Security Account Number card, unless the card includes one of the following restrictions: <ol style="list-style-type: none"> (1) NOT VALID FOR EMPLOYMENT (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION 2. Certification of report of birth issued by the Department of State (Forms 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-197) 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

Examples of many of these documents appear in Part 13 of the Handbook for Employers (M-274).

Refer to the instructions for more information about acceptable receipts.

Your Payroll Direct Deposit Information in *my*.SMU

To view/enter/update your direct deposit information, navigate to Self Service > Payroll and Compensation > Direct Deposit.

Your current banking information for payroll deposits will be displayed on the screen.

It is essential that you have accurate banking information to establish or update your direct deposit account record. Typically this information can be obtained by

- a. Contacting a customer service number for your financial institution
- b. Visiting a local bank branch or office, or
- c. Viewing your account information online within your bank's Web portal.

Direct deposit changes will be reflected on your next paycheck processed by SMU, as feasible – so, update your account information as soon as you know a change is needed.

- A general guideline (to ensure your changes are reflected on your next paycheck) is to have your direct deposit information updated in my.SMU by the "TIMEaccess & Elec.Extra Comp Approval Date" indicated on the [Payroll Processing Schedule](#) for the specific pay date.
- If a paycheck for you is being processed at the time you submit your changes, your changes may not be reflected until the following paycheck.

To **add** account information:

- Click the "Add Account" button.
- Complete all required fields of data on the page (indicated with a * next to the field name).
 - Use the [View check example](#) link on the page to understand the essential bank account information used for direct deposit transactions (Routing Number and Account Number).
 - ➔ Do not enter your debit card number as your account number!
 - "Amount or Percentage" is the only optional field on the page, to be completed if you are setting up an account to which you are allocating a specific amount or percentage from your net pay.
- For Account Type, choose "Checking" or "Savings."
- For Deposit Type, designate one account to be the "Balance of Net Pay" type of account.
 - If you are only using one account for your Payroll direct deposit, it should be designated as your "Balance of Net Pay" account.
 - If you are also allocating part of your net pay to another checking or savings account, the "Balance of Net Pay" account is the one to which the *rest* of your paycheck is deposited after you send a specified amount of money to a savings account, etc.
- Use the Amount or Percent field to allocate a portion of your net pay into an account with a Deposit Type of "Amount" or "Percentage."
- The value you indicate in the Deposit Order field will determine the order in which your net pay is allocated between multiple deposit accounts.
 - If you want to allocate your net pay between multiple accounts, assign the Deposit Order value in the order you want the accounts used for your deposit.
 - The account you designate as "1" will be the first to receive the designated amount or percentage.
 - The account you designate as "2" will be the second to receive the designated amount or percentage, etc.
 - Your "Balance of Net Pay" account will be assigned the Priority Value of '999' (the highest Deposit Order value) so that all other allocations are processed before that one.

- Click “Submit” at the bottom of the page to save the new account information. (A small ‘Saved’ image will display briefly in the upper right corner of your screen.)
- Click “Return to Direct Deposit” to view all of your updated account information.

To **change** existing account information:

- Click “Edit” button on the row to be updated. A new page will open with the fields populated with your current information.
- Update the field(s) as needed. Refer to account details provided by your financial institution to ensure the information you submit is valid.
 - Use the [View check example](#) link on the page to understand the essential bank account information used for direct deposit transactions (Routing Number and Account Number).
- To cancel any changes you’ve made on the page, click “Return to Direct Deposit” link at the bottom of the page *before clicking Submit*.
- Click “Submit” at the bottom of the page to save the new account information. (A small ‘Saved’ image will display briefly in the upper right corner of your screen.)
- Click “Return to Direct Deposit” to view all of your updated account information.

To **delete** existing account information:

- Click the “Delete” button on the row to be deleted.
- On the Delete Confirmation page, click “Yes” or “No” to complete the transaction.
- On the Submit Confirmation page, click “OK” to return to the Direct Deposit page.
- Review your updated direct deposit information to ensure that the correct account was deleted.

Note about deleting accounts:

The order in which you make changes matters! Be sure to add a new account before deleting the last row of existing account information. If you delete all of your accounts with the intention of then adding new account information, you will be required to wait until a later date to make changes to your direct deposit record. (See additional information below in *Submitting multiple changes*.)

Submitting multiple changes:

Direct deposit changes are limited to one self-service transaction per day. You can add or edit information for multiple direct deposit accounts in a single self-service transaction, but once you save the changes and exit the Direct Deposit page, you cannot make additional changes on the same day. If you attempt to make additional changes, a message appears from the Direct Deposit page saying that multiple direct deposit changes are not allowed on the same day.

Be sure to review all of your updated information *before* you navigate off the Direct Deposit page in Self Service.

If you submit direct deposit information and realize that you need to make additional changes *after* you leave the Direct Deposit page in Self Service, you will need to return to my.SMU on the following day to submit the new or changed information.

For additional assistance, please contact the Payroll Help Desk (payroll@smu.edu or 214-768-2073).

Your W-4 Elections in *my.SMU*

Go to <https://my.smu.edu/> and log in with your user name (SMU ID#) and password. You can make W-4 elections online via the Self Service area of my.SMU.edu under Payroll and Compensation. Please note that job data must be entered before you can make these elections. Check with your department to ensure that a Payroll Authorization Form (PAF) was submitted and that job data has been entered for your new job.

Please refer to our [Payroll Taxes](#) page for additional information, as well as [IRS instructions and worksheet](#) for properly completing the Form W-4. (Instructions are located at the top of the 1st page; the worksheet is on the 2nd page.)

Please note that the new information will be submitted immediately, but may not be reflected on the next paycheck if we are in the middle of processing a payroll.

Log in to my.SMU, go to Main Menu>Self Service>Payroll and Compensation>W-4 Tax Information

The screenshot shows the my.SMU website interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Self Service', and 'Payroll and Compensation'. The my.SMU logo is on the left, and 'On my.SMU', 'Questions/Comments', and 'Home' are on the right. Below the navigation bar, the page title is 'Payroll and Compensation'. A sub-header reads: 'Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.' There are four main links: 'View Paycheck' (Review current and prior paychecks), 'View W-2/W-2c Forms' (View electronic W-2 and W-2c forms), 'W-2/W-2c Consent' (Grant or withdraw consent to receive electronic W-2 and W-2c forms), 'Direct Deposit' (Add or update your direct deposit information), and 'W-4 Tax Information' (Review or change your W-4 information).

The screenshot shows the 'W-4 Tax Information' page on my.SMU. The breadcrumb trail is 'Favorites > Main Menu > Self Service > Payroll and Compensation > W-4 Tax Information'. The my.SMU logo is at the top left. The page title is 'W-4 Tax Information'. Below the title, it says 'Social Security Number' and 'Southern Methodist University'. A paragraph explains that Form W-4 is required for calculating tax withholding. It states: 'You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld. Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.' There are three input fields: 'Home Address', 'Mailing Address', and 'W-4 Tax Data'. The 'W-4 Tax Data' section includes: 'Enter total number of Allowances you are claiming' (input field with '0'), and 'Enter Additional Amount, if any, you want withheld from each paycheck' (input field). Below this, it asks to 'Indicate Marital Status' with radio buttons for 'Single' and 'Married' (selected). There are two checkboxes: one for 'Check here and select Single status if married but withholding at single rate. Note: If married, but legally separated, or spouse is a nonresident alien, select "Single" status.' and another for 'Check here if your last name differs from that shown on your social security card. You must call 1-800-772-1213 for a new card.' There is a 'Claim Exemption' section with a text area and a checkbox: 'I claim exemption from withholding for the year 2015 and I certify that I meet BOTH of the following conditions for exemption'. The 'Exemption Conditions' section includes: 'Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.' and 'This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.' There is a checkbox: 'Check this box if you meet both conditions to claim exempt status.' At the bottom, it says 'Under penalties of perjury, I declare that I have examined this certificate and to the best of' followed by a left-pointing arrow.