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**Professional Employee Checklist**

Welcome to Montana State University! The information and forms in this packet will assist you in completing the required Human Resource employment paperwork. If you need assistance at any point while completing your paperwork, please contact Human Resources hrservicecenter@montana.edu or (406) 994-3651.

Below is the list of the required forms. Please note that there are various time requirements for submission ranging from 3 to 30 days from your first day of work. **IMPORTANT, if you do not complete the “Choices” Health Benefit selection within the first 30 days of employment, you will default into the basic coverages for employee only and will forfeit the ability to add a spouse later without a qualifying event.**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ NetID: \_\_\_\_\_\_\_ Start Date: \_\_\_\_\_\_\_\_ Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

# **Please submit to the Office of Human Resources within 3 days of employment:**

## Eligibility Verification Form (I-9)

* + Electronic, through A-Check Global
	+ Section 1 (employee information) needs to be completed on or before start date; Section 2 (document verification) needs to be completed within 3 business days from start date. Your Department/Human Resource Service Center will assist you in completing this form. Please find the acceptable list of documents on the IRS website: <https://www.uscis.gov/i-9-central/form-i-9-acceptable-documents>

## W-4 Forms

* + State <https://mtrevenue.gov/publications/montana-employees-withholding-allowance-and-exemption-certificate-form-mw-4/>
	+ Federal <https://www.irs.gov/pub/irs-pdf/fw4.pdf>
	+ Additional Information <https://www.montana.edu/hr/benefits-payroll/taxes/index.html>

## MyInfo NetID Account Set-Up

* + How-to instructions <https://www.montana.edu/uit/ids-services/portal.html>

## Outlook Email Set-Up

* + How-to instructions <https://www.montana.edu/office365/employee/outlook-setup.html>

## Bobcat Jumpstart (highlights getting paid, benefits, paperwork, NetID setup, MyInfo tour, contact information, and Q&A.)

* + Registration Information <https://www.montana.edu/hr/recruitment-hiring-onboarding/orientation/>

# **Please submit to the Office of Human Resources within 30 days of employment:**

## New Employee Orientation

* + Registration Information <https://www.montana.edu/hr/recruitment-hiring-onboarding/orientation/>

## New Employee Benefit Orientation

* + Registration Information <https://www.montana.edu/hr/recruitment-hiring-onboarding/orientation/>
	+ CHOICES Enrollment for Insurance <https://choices.mus.edu/>
* Online TIAA/CREF Retirement Enrollment Legal Designation of Person Authorized to Receive
	+ Enrollment [www.tiaa-cref.org/montana](http://www.tiaa-cref.org/montana)
* State of Montana Designation of Decedents Warrants
	+ Paper Form: <https://www.montana.edu/hr/benefits-payroll/forms/index.html>
* Retirement System Information for Previous Employment (if applicable)
	+ Paper Form: <https://www.montana.edu/hr/benefits-payroll/forms/index.html>
* Certification of Prior Employment for Vacation Leave Earned (if applicable)
	+ Paper Form: <https://www.montana.edu/hr/benefits-payroll/forms/index.html>
* Workers Compensation Subsequent Injury Form (optional)
	+ Please return MSU Safety and Risk Management PO Box 170510 Bozeman MT, 59717
	+ <https://www.montana.edu/hr/benefits-payroll/forms/index.html>
* Direct Deposit form for Payroll (optional)
	+ Located MyInfo > Employee Services > Pay Information > Direct Deposit
* Intellectual Property Agreement for MSU Personnel
	+ Located MyInfo > MyApps
* MUS Vehicle Policy Form
	+ Located MyInfo > My Apps
* Mandatory Reporter Training (Discrimination and Harassment Prevention and Title IX Compliance Training- must be renewed every two years)
	+ Available Online <https://www.montana.edu/equity/training.html>
* Indian Education for All
	+ Available Online <http://www.montana.edu/iefa/index.html>​
* Degree History Form
	+ Available Online <https://www.montana.edu/hr/degree_history/>
* Parking Services (Check with Department)
	+ Located MyInfo > Parking Services
	+ Additional Information <https://www.montana.edu/parking/permits.html>
* Additional Information
	+ <https://www.montana.edu/hr/recruitment-hiring-onboarding/employment/index.html>

# **For any paper versions of the above documents, please submit via one of the following options:**

* *Fax to: Human Resources 406-994-5974*
* *Drop off: Human Resources Offices, 920 Technology Blvd. Suite A, Bozeman, MT 59718*
* *Campus Mail: Human Resources Offices, 920 Technology Blvd. Suite A, Bozeman, MT 59718*
* *Mail: Human Resources Offices, PO Box 172520 Bozeman, MT 59717-2520*