NEW APPOINTMENT PAYROLL PROCEDURE for US Citizens and Lawful Permanent Residents
Working Inside the United States

I. Purpose and Scope

The purpose of this procedure is to provide guidance to department administrators responsible for
payroll on the steps to be taken and documentation required when a U.S. Citizen or Lawful
Permanent Resident employee is hired. For information regarding Nonimmigrants working inside
the United States, see the New Appointment Payroll Procedure for Nonimmigrants Working Inside
the United States.

[The Payroll and Human Resources Departments are transitioning all new appointment processing
from paper to electronic submission. This procedure notes the points in the process where the
submission methods have not reached uniformity among job types.]

II. Responsibility for Implementing Procedure

- Faculty Records is responsible for reviewing all Faculty, Researcher, Academic, and Certificate
  Post-Doc Scholars paper Appointment Packets to ensure that the forms required by each job
type are included and complete. After applicable approvals, Faculty Records enters the US
Citizen and Permanent Resident appointment information into the HR/Payroll system and then
forwards the completed appointment packets to the Payroll Department for filing.
- Faculty Records is responsible for reviewing all Certificate Pre Doc Fellows Appointment packets
to ensure completeness and forwards to the Payroll Department for entry.
- The Payroll Department is responsible for reviewing Certificate Trainee paper Appointment
Forms for completeness, and for entering the appointment information into the HR/Payroll
system.
- The Human Resources Department is responsible for reviewing Staff, Federal Work Study,
  Student Workers and ALL-TEMP PittSource appointments for completeness, and for entering the
  appointment information into the HR/Payroll system.
- Administrators of payroll [or other designated employees] in a department or school are
  responsible for completing and submitting hiring proposals via the proper method.
- Employees are responsible for providing all required documentation, as specified herein.

III. Procedure

Faculty, Researcher, Academic, and Certificate Appointments – Appointment Form

Paper Appointment Forms are used to add faculty, researchers, academics and certificates to the
HR/Payroll system. Guidelines for hiring these appointment types are found on the Provost’s website.
Instructions for completing the paper appointment form are found in the Payroll Procedure Manual,
Chapter 1B. Special instructions for Certificates are provided in Chapter 11. For individual department or
school requirements, contact the department business manager or dean’s office.
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New appointment forms must be completed accurately. They are to be signed and submitted according to the procedures of the specific hiring department or school. A minimum of two authorizing signatures on a paper appointment form are required to comply with established internal controls and audit. Submission deadlines are available on the Payroll website.

Certificate Trainee appointment packets are submitted directly to the Payroll Department. All other appointment packets are submitted to The Office of Faculty Records.

An Employee Record is issued when the new appointment has been processed. This form is utilized by the designated department/school administrator to review the data entered into the Human Resources/Payroll system information for accuracy. That process is addressed separately in the Payroll Procedure Manual, Chapter 3.

Staff, Federal Work Study, Student Worker and ALL-TEMP Appointments - PittSource

PittSource is used to process staff, federal work study, student worker, and ALL-TEMP appointments as part of the job posting and hiring process. Guidelines for hiring staff and ALL-TEMPS are found on the Manager Resources section of the Human Resources website. Federal Work Study guidelines are found on the Office of Admissions and Financial Aid website. Guidelines for hiring students are found in the Student Employment Policy Manual. For more information on the PittSource process, visit the Department of Human Resources website.

New appointments completed through PittSource must be approved and submitted according to the procedures of the specific hiring department or school. Submission deadlines are available on the Payroll website.

An Employee Record is issued when the new appointment has been processed. This form is utilized by the designated department/school administrator to review the data entered into the Human Resources/Payroll system information for accuracy. That process is addressed separately in the Payroll Procedure Manual, Chapter 3.

IV. Requirements for All New Appointments

All new employees are required to

- Complete an Electronic I-9. (I-9s are completed at one of the I-9 Service Centers on campus. Click on the link for information.)
- Provide their social security number and name as it appears on their social security card.
- Certify their permanent residence address as required by the state of PA for tax withholding determination.
- Complete a withholding allowance certificate for federal tax withholding.
- Complete a Direct Deposit form for direct deposit of their pay.
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**Social Security Number** Newly hired employees must present their social security number or provide a copy of the application receipt for taxation reporting purposes. Both the name and number on record as printed on the social security card or receipt must match the appointment submission.

**Residency Certification Form (RCF)** The state of Pennsylvania requires all employees to provide the address of their primary residence for taxation purposes. The address provided will serve as the employee’s official permanent residence address of record for all taxation determinations. This address will also be utilized by payroll and human resources for communications sent via US mail. Staff and ALL-TEMPS are to confirm their address online through Employee Online Self Service. All other employees are to complete the paper form at the time of their appointment. Updates for all employees will be processed through Employee Online Self Service.

**W-4** The Internal Revenue Service requires all employees to complete a Withholding Allowance Certificate (W-4). All non-staff new hires are to complete paper W-4 forms. Staff and ALL-TEMPS receive instructions for confirming/updating their W-4 information during staff orientation sessions. Updates will be processed through Employee Online Self Service.

**Direct Deposit** Newly hired individuals must complete a paper direct deposit form to have their pay deposited on payday.

**Local Services Tax Exemption Form (optional)** This form is required only if the employee wishes to claim exemption from Local Services Tax. The form is recommended for part time student employees. Certain qualifications must be met for exemption. See form for details.

**New Appointment/Rehire – Forms Checklists for U.S. Citizen and Lawful Permanent Residents Working Inside the United States** Payroll and Faculty Records checklists of documents required by job type are available on the Administrator Resources Referenced Forms tab.

**V. Forms and Resources**

- New Appointment Form
- Social Security Card Social/Security Number Application Form
- Residency Certification/Address Change Online Submission
- Online W-4
- Direct Deposit Form
- Local Services Tax Exemption Form
- New Appointment Form Line-by-line Instructions
- Turn-Around Employee Record Review Procedure
- Department Admin Payroll Checklist for US Citizens and Permanent Residents
- Department Admin Faculty Records Checklist for all Citizenship Statuses
VI. Records The New Appointment Form and corresponding documents are stored by the Payroll Department in the employee’s payroll file. The payroll file is retained for a period of ten years after an employee leaves the University.