PROCEDURES TO COMPLETE PAYROLL, PHEAA AND BACKGROUND CHECK FORMS

**I-9 Form**
- Section 1 must be completed by the student, Section 2 must be completed by the supervisor
- Instructions are on page 3
- Supervisors must physically view original ID’s when following the instructions on page 3
- Supervisors DO NOT need to make copies of ID

**W4 form**
- Follow Instructions on page 2 of the W4 form, Only first page is required

**Ethnicity form (Optional)**
- This is a voluntary form to collect data. The student can decline to complete.

**Residency Certification form local earned income tax withholding**
- Employee must complete the top and bottom of section
- PSD Code and Residential tax rate can remain blank (programmed into SAP)

**Direct deposit form (Optional)**
- The student can decline to complete, but is highly encouraged to.

**Background check certification for provisional employment form**
- Student completes Sections 1, 3, 4 and 5

**Background release form**
- Student fills out the complete form in order to allow human resources to complete the background checks

**Reporting of Arrest or Conviction Forms**
- Outlines the requirement to self-report within 72 hours of certain convictions, student must sign the form

**Local services tax exemption form (If required)**
- Most students should complete this form
- They choose either option 1 or 2
  - Reason 1 – Multiple Employers - if they work multiple jobs and have this tax deducted from another employer. They must provide a copy of pay statement for proof and this should be sent to HRConnect with the other documents.
  - Reason 2 – Earn less than $12,000 annually. Side two does not need completed, just signed.

**Form REV-419 EX (Ohio, WV, Virginia Residence) (If Required)**
- Students with addresses in Ohio, New Jersey, West Virginia and Virginia must complete. This allows the University to withhold their state’s withholding tax and exempts withholding of PA tax.

**Statement of Citizenship Status & Taxation by year – (If Required)**
- Required for Resident and Non-Resident Aliens only. If you have any questions about the form please contact payroll shared services.
- Non-Resident Aliens should contact Andrew Conlogue at conlogue@pennwest.edu to obtain form I-20 (Certificate of Eligibility for Nonimmigrant Student Status).

**PHEAA application - Instructions on form**