

A complete new hire packet includes a Payroll Information Form, a W-4, an Application for Student/Intermittent Employment (application not required for faculty) and an I-9. A change in pay rate requires a payroll information form only. Following are instructions on how to complete these forms.

An I-9 must be completed on the first day of employment and original documents must be submitted by the employee within 3 days of employment or the employee may not work.

How to Complete a Payroll Information Form (PIF)

Instructions for the Employee

- ❑ Complete Personal Data section (This is the first enclosed section.)
- ❑ Sign and Date at bottom of form where it is marked **“Employee”**
- ❑ Give this form to your supervisor to complete Job Data panels section (These are the 2nd and 3rd sections).
- ❑ When completed, bring the Payroll Information Form to Cal Poly Corporation (CPC) Human Resources, located in the CPC Business Office, Building 15.
- ❑ If you are working on a Sponsored Project or for Conference Services an additional signature is required. The Sponsored Programs office is located in Building 38, Room 103. Conference Services is located in Building 116, Room 211.

Instructions for the Supervisor

- ❑ Complete all sections of Job Data Panels (Action, Position Title, Org Key, Account Code, Workers' Comp Code, Effective Date & Pay Rate must be completed). Verify that the employee has completed his/her section & signed.
- ❑ Sign at bottom of the form next to **“Authorized By”** and date. Please remember to print your name next to the signature and include a telephone number so Human Resources can contact you with any questions.
- ❑ Submit to Human Resources with all other required paperwork.

How to Complete a W-4

Instructions for Employee:

Use the worksheet to assist you in deciding what amount you should claim. Complete sections 1, 2 and 3 and sections 5, 6 and 7 as applicable. Sign and date the form.

- ☐ If you do not complete a form, or complete the form incorrectly, the IRS default is **Single** and **0**.
- ☐ If you wish to claim a different amount for state taxes you must complete the State Tax form.

How to Complete an I-9

Instructions for Employee:

- ❖ Complete **ONLY** Section 1.
- ❖ Check one of the three boxes describing your legal status
- ❖ Sign your name and date under the words **“Employee’s Signature”**
- ❖ Bring **original** documents proving you can work in the United States to either your Supervisor (if requested by Supervisor) or the Human Resources Office (Building 15) for verification.
- ❖ See back of I-9 for a list of acceptable documents. Most common are drivers license and social security card.
- ❖ **Foreign students must bring your I-9 and all Visa documents (Passport, I-94 & I-20) required for employment to the Human Resources Office for verification. You must have a Social Security number before beginning employment.**

Instructions for Supervisor:

- ❖ Accept only Original Documents for Verification of employment eligibility.
- ❖ If you only see the receipt please write the word **“RECEIPT”** next to the document title.
- ❖ You must completely fill out all lines applicable to the documentation shown.
- ❖ Two picture Ids are not necessarily acceptable documents. Refer to the backside of the I-9 for a list of acceptable documents. Most common documents are an original driver’s license and social security card.
- ❖ Expiration dates are very important.
- ❖ Send foreign students to Human Resources for employment eligibility verification.