

### Onboarding Checklist for Employees Working Remotely from a Non-U.S. Location

Welcome to Carnegie Mellon University! This checklist is designed for new faculty and staff working remotely from a non-U.S. location. The information and onboarding tasks included in Part I will prepare you to get started working remotely from your international location. Part II outlines the additional onboarding tasks required upon your transition to your U.S. campus.

To help you get started, CMU's HR Service Center will send you two emails (at your personal email address). The first email includes a link to the Onboarding Questions for Individuals Working Remotely from a Non-U.S. Location form. Please complete and submit this form as soon as possible. Your answers to the onboarding questions will be used to create a customized onboarding packet, which will be sent to you in the second email. The packet provides detailed instructions and attachments related to your Part I onboarding tasks. Meanwhile, please visit the [Human Resources Service website](#) for additional information concerning onboarding, Workday (CMU's Human Resource Information System), benefits and payroll.

#### Part I – Complete Immediately upon Hire at your International Remote Work Location

**Accessing your Andrew Account** — *(What is an Andrew Account? Your Andrew account is your gateway to the computing environment at Carnegie Mellon University. Your Andrew ID and password allow you to access email, Workday, network registration, public computer labs and other resources. As such, obtaining access to your Andrew account is a prerequisite to the other onboarding tasks and should be completed as soon as possible.)*

To access your Andrew account:

- Complete the Prior Affiliation Questionnaire – If you have no prior affiliation with CMU (or if Identity Services cannot identify a prior affiliation), you will receive an email (personal email address) from Identity Services asking you to complete a Prior Affiliation Questionnaire (PAQ). If you are a former CMU student or a rehire, you may not be asked to complete the PAQ.
- Set up your Andrew ID/password and DUO 2fa - You will receive an email (at your personal email address) with setup instructions. If you have an Andrew ID from prior employment or are an alumnus, please contact [Identity Services](#) for instructions on how to set up DUO 2fa and/or reset your password. Failure to complete these tasks in a timely manner will delay access to your Andrew account.

**Note:** Your CMU email address is created using your Andrew ID.

**Workday Onboarding Tasks** — *(What is Workday? Workday is the cloud-based human capital management software used by CMU. Employees log on to Workday to provide personal information; complete required tasks; manage payroll, tax, and benefits elections; track time (hourly employees); request leave, and more.)*

Once you have obtained access to your Andrew account, you can log in to Workday to complete the onboarding tasks listed below. (Visit the HR Service Center's New Faculty and Staff page for login instructions.) We recommend that you complete the first three Workday onboarding tasks in the order listed below and as soon as possible:

- Personal Information - Complete and submit your personal information, including gender, date of birth, race/ethnicity, military service status, and citizenship.

**Note:** For citizenship, you will be asked to select one of the following: U.S. citizen, non-U.S. citizen, or permanent resident. Also, if you are not a U.S. citizen, please indicate your country of citizenship.

- Voluntary Disability Self-Identification – While this is a required task, self-identification is voluntary, and “I do not wish to answer” is an option for every question.
- Review Documents – As a CMU employee, you are required to review all documents listed in this task. The task asks that you read the document, check the acknowledgement box, and then click Submit at the bottom of the page to complete the task.

The following additional onboarding tasks will appear in your Workday inbox on your hire date. When and if you are required to complete them depends on a number of employment factors, which are outlined below. Please retain any of these tasks that you do not complete as a remote employee in your Workday inbox until you start working in the U.S., as you may need them.

- Emergency Contact – Complete this task from your Workday inbox. All employees should complete this task upon hire.
- Tax Elections – Whether or not you complete this task from your remote location depends on your citizenship and prior work history in the U.S. The HR Service Center will provide guidance to non-U.S. citizen/permanent residents.
- Payment Elections (if not already completed) – Complete this task from your remote location if you have a U.S. bank account that you wish to have your pay direct deposited into.

**Note:** If you use the International Wire Payroll form to have your pay wired to a bank outside the U.S., your payment elections in Workday will show the bank that CMU uses to transfer funds. Your non-U.S. bank information will not appear in Workday.

- Benefits Enrollment – If you are benefits eligible, HR will send you an email outlining your benefits options and enrollment instructions. (Note: You will not see this task in your inbox if you are not benefits eligible.)

**Identity Verification** — The federally mandated employment eligibility verification for work in the U.S. (Form I-9) will not be completed until you actually begin working in the U.S. However, at this time, you are required to provide a scan of your passport photo page, which will be used during a scheduled Zoom video call with the HR Service Center to verify your identity. (You will be asked to upload the scan of your passport photo page into Workday as part of completing the Bank and Tax Information steps below.) In addition to your identity, the Zoom call is used to verify your international address and work location, bank information, and tax information.

**Bank and Tax Information** — Before CMU can issue you a paycheck, you will need to complete all of the tasks in A, B, C or D below:

**A. If you are a U.S. citizen or permanent resident:**

- Upload the following documents in Workday using the process outlined in the [Worker Documents: Uploading Supporting Documents in Workday system guide \[pdf\]](#):
  - A scan of your passport photo page
- Provide your Social Security number during the Zoom video call.
- Submit your payment elections via the Payment Elections task in Workday. (This task requires a U.S. bank account, and your pay will be sent via direct deposit.)
- Submit your tax elections via the [Tax Elections](#) task in Workday.

**B. If you are a non-U.S. citizen/permanent resident with an SSN and with a U.S. bank account:**

- Upload the following documents in Workday using the process outlined in the [Worker Documents: Uploading Supporting Documents in Workday system guide \[pdf\]](#):
  - A scan of your passport photo page
  - The Form W-8BEN (completed)
- Provide your Social Security number during the Zoom video call.
- Submit your payment elections via the Payment Elections task in Workday. (This task requires a U.S. bank account, and your pay will be sent via direct deposit.)
- Payroll Services will provide assistance if tax elections are required.

**C. If you are a non-U.S. citizen/permanent resident without an SSN and with a U.S. bank account:**

- Upload the following documents in Workday using the process outlined in the [Worker Documents: Uploading Supporting Documents in Workday system guide \[pdf\]](#):
  - A scan of your passport photo page
  - The Form W-8BEN (completed)
- Submit your payment elections via the Payment Elections task in Workday. (This task requires a U.S. bank account, and your pay will be sent via direct deposit.)
- Payroll Services will provide assistance if tax elections are required.

**D. If you are a non-U.S. citizen/permanent resident without an SSN and without a U.S. bank account:**

- Upload the following documents in Workday using the process outlined in the [Worker Documents: Uploading Supporting Documents in Workday system guide \[pdf\]](#):
  - A scan of your passport photo page
  - The Form W-8BEN (completed)
  - The Wire Transfer Payroll Form (completed)
- Payroll Services will provide assistance if tax elections are required.
- Your bank information will be verified along with your identity during the Zoom video call.

**Note:** CMU will not be able to pay you if country of citizenship and U.S. status have not been provided to and confirmed by the HR Service Center.

## Part II – Complete upon Arrival at your U.S. Campus

Once you start working in the United States, you will need to complete the following additional onboarding tasks. The Office of Human Resources offers Onboarding Session designed to assist you with these tasks. Please contact the HR Service Center at [hr-help@andrew.cmu.edu](mailto:hr-help@andrew.cmu.edu) for more information.

## Employment Eligibility Verification (Form I-9) —

To be eligible to work in the United States, you are required by federal law to complete sections 1 and 2 of the Form I-9 no later than your first day of work in the U.S.

### Form I-9 Section 1:

- Initiate the Form I-9 task in Workday. (This is required because the I-9 task was cancelled at the time of hire. The HR Service Center will provide instructions as soon as they have confirmed your U.S. start date.)
- Complete the Form I-9 Section 1 in Workday once the task is initiated.

### Form I-9 Section 2: Verify Identity and Employment Authorization

- Compile your original documents from the [List of Acceptable Documents \[pdf\]](#)
- An HR Service Center representative will schedule an appointment to complete Section 2.
- Present your original, unexpired documents to HR no later than your first day of work in the U.S.

**Note:** The process you are asked to follow to present your I-9 Section 2 documents to HR will depend on whether the COVID-19 remote process or the normal in-person process is in place at the time.

## Social Security Number —

- Provide your SSN to the HR Service Center (412-268-4600) as soon as you receive your Social Security card.

## Workday Onboarding Tasks —

- Tax Elections†‡ – Tax withholdings elections (IRS Form W-4) are managed by accessing the electronic tax forms available in Workday (requires an SSN).
  - Quick Guide: [Electronic Tax Forms \(W4 and Multi-State\) \[pdf\]](#)
- Payment Elections (Direct Deposit)‡ – All employees are encouraged to set up direct deposit to a U.S. bank account through the payment elections task in Workday (requires an SSN).
  - Quick Guide: [Direct Deposit Quick Guide \[pdf\]](#)

† If you are a foreign national, the HR Service Center will contact you via email about completing information online with the Foreign National Information System (FNIS) and Windstar. Without this information, we cannot provide you with applicable tax exemptions. For more information, please visit the Tax Resources and review the information for Foreign Nationals. The Office of International Education has additional resources for Foreign Nationals.

‡ An SSN and U.S. bank account are required for direct deposit setup and for access to the electronic tax withholding forms. Many benefits carriers also require an SSN.

## Benefits —

- Benefits Changes – If applicable, you will be contacted by HR concerning your benefits options now that you are working in the U.S.
- Dependent Verification. If adding dependents to your benefit elections, documentation verifying their relationship to you is required. Note that, once the dependent has been verified, re-verification is not necessary.

- You can submit your dependent verification documentation by uploading it to Workday using the process outlined in the [Worker Documents: Uploading Supporting Documents in Workday system guide \[pdf\]](#). (Be sure to use the process for Benefits-related documents.)
- View [Accepted Dependent Eligibility Documentation \[pdf\]](#).

### Getting Around your U.S. Campus —

- CMU ID Card – Your CMU ID card can be obtained from The HUB, located in the lower level of Warner Hall. It gives you access to campus buildings, parking garages, fitness facilities and Port Authority/campus transportation.

Non-Pittsburgh locations: Please contact your supervisor for information about obtaining your CMU ID Card.

- Commuting Options – Review the [Commute Options](#) available to you and the option of purchasing a parking permit.

Non-Pittsburgh/off-campus facilities: Please contact your supervisor for information about commuting options.