University of Southern California
Postdoctoral Fellow – Teaching Associate/Research Assistant
Check Off List

**Departmental Responsibilities**

**Initial Appointment**

1. _____ Offer letter – copy sent to Postdoctoral Office
2. _____ Confirm Doctoral Diploma or Certification for Terminal Degree
3. _____ Confirm Fellowship support, terms, and conditions
4. _____ Confirm fellow is established on Student Information System
5. _____ Confirm fellow is enrolled in PDF-999
6. _____ Contact Student Health Center
7. _____ Sent fellow to USCard with a memo for “Postdoctoral Scholar” ID card

**Each Semester**

1. _____ Confirm registration
2. _____ Send Data Form to Payroll for stipend funding establishment only

**Annually**

1. _____ Reappointment Letter

**Requirements for Payroll**

1. _____ Assign job title 098211 Teaching Associate or 098215 Research Assistant
2. _____ Fellow must now supply a valid Social Security Number; NRA must apply if does not already have a Social Security number.
3. _____ Data form submitted with funding information
4. _____ W-4 required; DE-4 if desired
5. _____ Non-resident alien only: 8233 or W-9, and attachments, if employee desired to take advantage of treaty 1
6. _____ Glacier Tax Summary with attached copies of required documents
7. _____ I-9 form with attached support documentation
8. _____ eTrac – Advise employee how to access and what services are provided by eTrac
9. _____ Direct Deposit – Advise employee how to sign up for direct deposit via eTrac
10. _____ Electronic W-2 – Advise employee how to sign up for electronic W-2

1 Glacier will determine tax treaty eligibility and produce the appropriate form and attachment. See User’s Guide 300-14 for more information.

For detailed information see User’s Guide 300-5 (New/Rehire Students); 300-8 (New/Rehire NRA Students), 300-14 (NRAs), and 300-11 (I-9s)

Revised May 2008