Gather and Attach Documents

Each hire/rehire requires specific documents to support the transaction. Reference the charts below for a list of required documents for each hire type, the attachment type, and the order in which they must be attached. Group documents into the following categories in the order listed to then scan and save to the transaction. Documents can be attached in one file and category or several as per the employee type and department practices/guidelines.

Note: The "**Form I-9**" is completed electronically and is not attached to the hiring file.

To avoid repeating the listings, reference the document names in this chart if the category is required for the hire/rehire.

Document Type	Document Name	Comments
Tax Forms	- W-4 - IT-2104 (for all employees) - IT-2104.1 (for non-NYC/Yonkers or non-NYS residents only) - IT-2104.E (for students under age 25) - New Jersey, Connecticut, or other registered states (if applicable) - Tax treaty forms (8233, if applicable) - Form 673 (if applicable) - Employee Certification for Working Outside of NYS (if applicable)	Tax documents apply to all paid hires.
Visa Documents	- Permanent Residents- copy of P.R. card (form I-551, front and back) - International Employees, Students, Teachers, and Researchers - copies of visas and other related forms - F-1: passport biographical page, Visa, I-94, I-20. If on OPT copy of I-766 or receipt for OPT-STEM only - J-1: passport biographical page, Visa, I-94, DS2019 - H-1: passport biographical page, I-94, I-797 - O-1: passport biographical page, I-94, I-797, and if applicable, I-129 - TN: passport biographical page, I-94, I-797	Visa/Permit type Expiration Date must be the same as the supporting documents.
Academic Appointment Supporting Documents	- Offer letter - Justification letter (if applicable) - CV - Affirmative Action Clearance - Award Letter for Postdoctoral Research Fellows - Postdoctoral Incidental Career Development Activities Form (if applicable) - Proof PhD Degree Earned (if applicable) - Approved Staff Associate Questionnaire (if applicable) - Approved Instructional Authorization Form (if applicable)	

Student Hires - Attach one file with all documents using the Hiring Documents attachment type	
Student Officers	**Student Casuals and Non-Student Casuals**
1. SSN Receipt or SSN Notice (if applicable) 2. W-4 tax form 3. Other tax forms as applicable (see listing) 4. NYS Paid Family Leave Waiver (if applicable) 5. Visa Documents as applicable (see listing) 6. Academic Support Documents (see listing) 7. Voluntary Self-Identification of Race and Ethnicity	1. SSN Receipt or SSN Notice (if applicable) 2. W-4 tax form 3. Other tax forms as applicable (see listing) 4. NYS Paid Family Leave Waiver (if applicable) 5. NYS 195 6. Casual Employment Form 7. Visa Documents as applicable (see listing) 8. Voluntary Self-Identification of Race and Ethnicity

Morningside Academic	
Academic Appointment Hiring Documents (AHD) – 1st attachment	**Academic Appointment Supporting Documents (AASD) – 2nd attachment**
1. SSN Receipt or SSN Notice (if applicable) 2. W-4 3. Other tax forms as applicable (see listing) 4. NYS Paid Family Leave Waiver (if applicable) 5. NYS 195 (all employees except student officers) 6. Visa Documents as applicable (see listing) 7. Voluntary Self-Identification of Race and Ethnicity 8. Invention Agreement 9. Annualization and Periodization Calculation Form 10. Stipend Form	1. See Listing

Administrative Hires/Rehires (all Campuses) and CUIMC Clinical Hires/Rehires		

Use the applicable categories in the relevant template and groupings as per your current business practice.

Document Category	Document Name	Comments
CV/Resume	• CV • Resume	CVs are for academic faculty. Resumes are for administrative staff.
Cover Letter	• Cover Letter	Not required for academic personnel.

Document Category	Document Name	Comments
Hiring Documents	• Chairman's letter (CUIMC only) • SSN Receipt or SSN Notice • NYS 195 (1) • Position classification form (approved staff associate questionnaire) • Proof of PhD • Salary justification • $0 salary justification/description • TalentLink* Documents (for positions posted in TalentLink on or after 4/4/2019): Application, Resume, Offer Letter, and Offer Card (for administrative transactions only) • Drug screening email (for casual, SSA and Joint Commission hires) • Leave authorization • Disclosure of Criminal Background Form (if hiring outside of TalentLink)	
Hospital Documents	• Billing Compliance attestation • Board Certification • HIPAA • DEA • Delineation of privileges form • ECFMG Certificate (Foreign medical graduates) • Hospital application • Hospital approval form • Infection control certification • License/registration • Malpractice insurance certificate • Medicare acknowledgement statement • Primary source verification • Reference letters (2)	These documents are for clinical faculty only.
Invention Agreement	• Invention Agreement	Academic personnel only.
Offer Letter	• Offer letter (including Short-Term Casual Offer Letter from TalentLink*) • Offer Card from TalentLink* (can either be attached in **Offer Letter** category or **Hiring Documents** category)	
References	• References	
Supporting Visa/NRA Documents	See Listing	
Tax Forms	• See Listing	Tax documents apply to all paid hires.
Transcripts	• Transcripts	

*For information on how to select documents to attach as a pdf file to the TBH transaction, view the TalentLink How to Obtain and Attach Hiring Documents to a TBH or PAF Job Aid. Please note that all other hiring documents not within TalentLink, such as the NYS 195, tax forms, etc., are still required attachments.

COLUMBIA UNIVERSITY
Human Resources

April 2024

Scan Documents

1. Follow your department's procedure on scanning documents. Options include:
   - Scan documents into a secure network shared drive
   - Scan documents into an encrypted local hard drive (contact IT regarding desktop encryption)
   - Scan documents to your local hard drive and then delete them after uploading to the hire/rehire transaction

   Documents should not be emailed as they contain sensitive employee information.

2. Save the scanned item(s), with a clearly labeled description, e.g., "JasonJones_Hiring Documents"
   a. It is recommended to attach files in 'pdf' format as they are more stable and take up less storage

Additional Scanning Notes

   - Electronic copies of documents can also be attached. If you receive a document via email and save it to a secure shared drive or encrypted local drive, you can attach the document without scanning it first – since it is already saved electronically. Note that it would be a separately attached document and not included in the designated groupings.
   - Documents with foreign wording can be scanned and saved as a PDF file. This will preserve the formatting and ensure that words will not be converted to symbols.

Attach Documents to the Template:

Documents are added to Hire/Rehire templates in the **Attachments** section on page 1 of the template.

1. Select the **Attachment Type** - click the drop-down arrow to the right and select the category
2. Click the **Upload** button
3. Click **Browse** to locate the scanned documents files
4. **Select** the file, e.g., "JasonJones_Hiring Documents"
5. Click **Upload**

To attach additional documents, click the **"+"** button at the end of the row and repeat the steps.

To remove documents, click the **"-"** button at the end of the row to delete the attached documents in that row.

To view documents, click the "View" button to the right of a row and they will appear in a separate window.
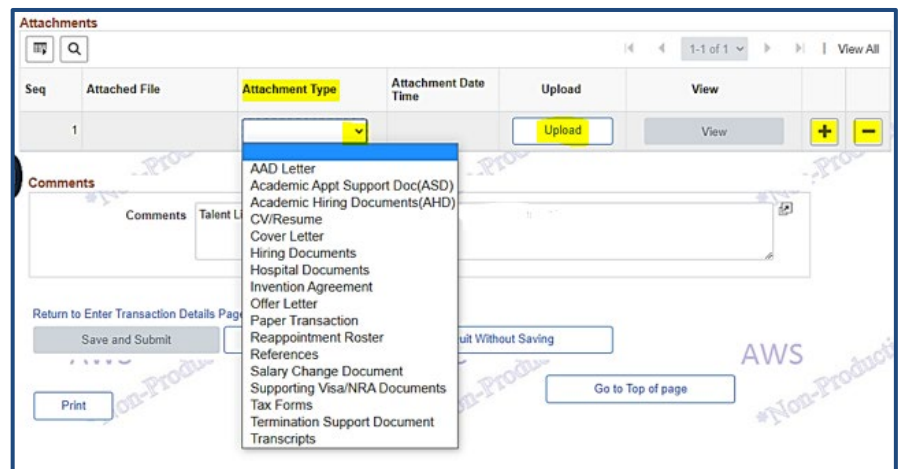
Troubleshooting Technical Issues

To ensure that you can view documents you attached, allow pop-ups from the PAC website.

Getting Help

If you have any questions, please contact the [HR Service Center](#) where you can log an incident or request a service or contact them at 212-851-2888.