

## Attaching Documents in Template Based Hire (TBH) – Job Aid

**To access PAC training information, visit the Human Resources Website.**

**Purpose:**

To provide you with the list of required documents for hires/rehires and the steps to attach them in TBH.

**Gather Documents**

Each hire type requires specific documents to be submitted to support the hire / rehire transaction. Reference the chart below for a list of required documents for each hire type, the attachment type they belong in and the order in which they must be attached.

**Attachment Types and Their Documents**

Group documents into the following categories in the order listed. They will be scanned and saved to the transaction.

Morningside Academic	
Academic Appointment Hiring Documents (AHD) – 1 <sup>st</sup> attachment	Academic Appointment Supporting Documents (AASD) – 2 <sup>nd</sup> attachment
<ol style="list-style-type: none"> <li>1. W-4</li> <li>2. Other tax forms as applicable                             <ol style="list-style-type: none"> <li>a. IT-2104 (for NY residents only)</li> <li>b. IT-2104.1 (for non NYC/State residents only)</li> <li>c. IT-2104.E (for students under age 25)</li> <li>d. New Jersey tax forms (if applicable)</li> <li>e. Tax treaty forms (8823, if applicable)</li> <li>f. Form 673 (if applicable)</li> </ol> </li> <li>3. PFL Waiver</li> <li>4. NYS 195</li> <li>5. Visa Documents as applicable                             <ol style="list-style-type: none"> <li>a. Visa</li> <li>b. EAC</li> <li>c. I-20 / DS-2019 / I-797 / H1 - 194 Card</li> <li>d. PR Card (for Permanent Residents). Front and back</li> <li>e. Copy of Passport (NRA only)</li> </ol> </li> <li>6. Race/Ethnicity Form</li> <li>7. Invention Agreement</li> <li>8. Annualization and Periodization Calculation Form</li> <li>9. Stipend Form</li> <li>10. Disclosure of Criminal Background Check Form (if required)</li> </ol>	<ol style="list-style-type: none"> <li>1. Offer letter</li> <li>2. Justification letter (if applicable)</li> <li>3. CV</li> <li>4. Proof PhD Degree Earned</li> <li>5. Approved Staff Associate Questionnaire (if applicable)</li> <li>6. Approved Instructional Authorization Form (if applicable)</li> <li>7. SIS / SSOL (Proof of FT enrollment for Student Officers)</li> </ol>

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

For **Administrative Hires and Rehires** and **CUIMC Clinical Hires and Rehires**, use the applicable categories in the relevant template and groupings as per your current business practice.

Document Categories	Document Name	Comments
<b>CV/Resume</b>	<ul style="list-style-type: none"> <li>CV</li> <li>Resume</li> </ul>	CVs are for academic faculty. Resumes are for administrative staff.
<b>Cover Letter</b>	<ul style="list-style-type: none"> <li>Cover Letter</li> </ul>	Not required for academic personnel.
<b>Hiring Documents</b>	<ul style="list-style-type: none"> <li>Chairman’s letter (CUIMC only)</li> <li>NYS 195 (1)</li> <li>Position classification form (approved staff associate questionnaire)</li> <li>Proof of PhD</li> <li>Salary justification</li> <li>\$0 salary justification/description</li> <li>JAC Documents (for positions posted in JAC prior to 4/4/2019): Job Posting, Applicant Flow, Application &amp; Resume, and Casual Employment Form if applicable (for administrative transactions only)</li> <li>TalentLink* Documents (for positions posted in TalentLink on or after 4/4/2019): Application, Resume, Offer Letter, and Offer Card (for administrative transactions only)</li> <li>Drug screening email (for casual, SSA and Joint Commission hires)</li> <li>Leave authorization</li> <li>Disclosure of Criminal Background Form (if hiring outside of TalentLink)</li> </ul>	
<b>Hospital Documents</b>	<ul style="list-style-type: none"> <li>Billing Compliance attestation</li> <li>Board Certification</li> <li>HIPAA</li> <li>DEA</li> <li>Delineation of privileges form</li> <li>ECFMG Certificate (Foreign medical graduates)</li> <li>Hospital application</li> <li>Hospital approval form</li> <li>Infection control certification</li> <li>License/registration</li> <li>Malpractice insurance certificate</li> <li>Medicare acknowledgement statement</li> <li>Primary source verification</li> <li>Reference letters (2)</li> </ul>	These documents are for clinical faculty only.
<b>Invention Agreement</b>	<ul style="list-style-type: none"> <li>Invention Agreement</li> </ul>	Academic personnel only.
<b>Offer Letter</b>	<ul style="list-style-type: none"> <li>Offer letter (including Short-Term Casual Offer Letter from TalentLink*)</li> <li>Offer Card from TalentLink* (can either be attached in <b>Offer Letter</b> category or <b>Hiring Documents</b> category)</li> </ul>	

\*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.

Document Categories	Document Name	Comments
<b>References</b>	<ul style="list-style-type: none"> <li>References</li> </ul>	
<b>Supporting Visa/NRA Documents</b>	<ul style="list-style-type: none"> <li>Visa (when an NRA)</li> <li>Passport Copy (NRA only)</li> <li>EAD Card (NRA Only)</li> <li>I-20/DS-2019/I-797 (NRA Only)</li> <li>PR Card (for Permanent Residents)</li> <li>H1 (I94 Card)</li> </ul> <p>Note: Visa/Permit type Expiration Date must be the same as the supporting documents.</p>	
<b>Tax Forms</b>	<ul style="list-style-type: none"> <li>W-4</li> <li>IT-2104 (for NY residents only)</li> <li>IT-2104.1 (for non NYC/State residents only)</li> <li>IT-2104.E (for students under age 25)</li> <li>New Jersey tax forms (if applicable)</li> <li>Tax treaty forms</li> <li>Form 673 (if applicable)</li> </ul>	Tax documents apply to all paid hires.
<b>Transcripts</b>	<ul style="list-style-type: none"> <li>Transcripts</li> </ul>	

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## Scan Documents

1. Follow your department's procedure on scanning documents. Options include:
  - o Scan documents into a secure network shared drive
  - o Scan documents into an encrypted local hard drive (see CUIT regarding desktop encryption)
  - o Scan documents to your local hard drive and then delete them after uploading them 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 of what is contained in the attachment. For example, "JasonJones\_Hiring Documents"
  - a. It is recommended that all attached files are in 'pdf' format. PDF documents are more stable and also take up less electronic storage space

### Additional Scanning Notes

- o 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
- o 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:

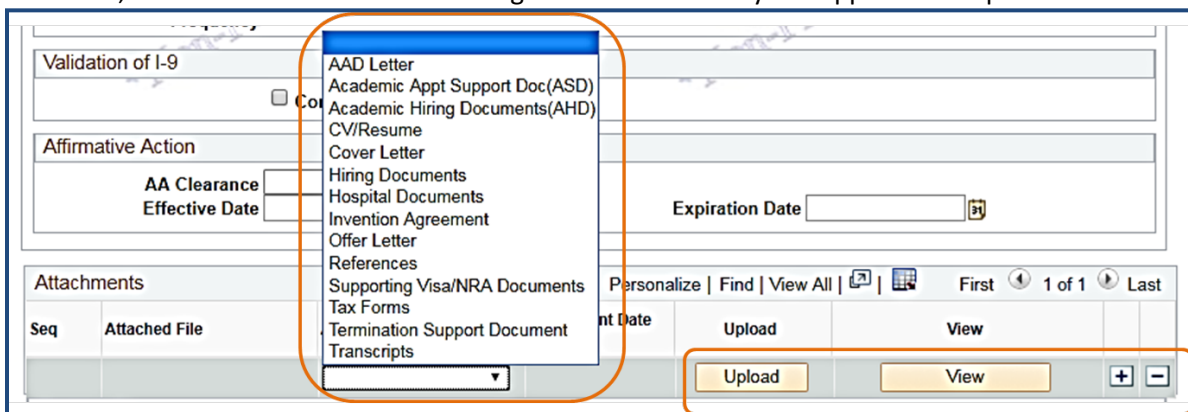
Documents are added to Hire/Rehire templates in the Attachments section in page 1 of the template.

1. **Select the Attachment Type** by click the drop down arrow to the right of the row and select the category from the list
2. **Click the "Upload" button**
3. **Click the "Browse" button** to locate the group of scanned documents where saved
4. **Select the saved group of documents.** E.g. "JasonJones\_Hiring Documents"
5. **Click the "Upload" button**

**To attach additional documents,** click the "+" button at the end of the row and an additional entry row appears.

**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 view documents you attached, allow pop-ups from the PAC website.



### How to Change Internet Explorer Computer Settings to Allow Pop-Ups:

1. Depending upon the IE version:
  - i. Click **'Tools'** from the menu bar or
  - ii. **'Internet Options'** from the gear in the upper right hand corner (dependent upon the IE version)
2. Click the **Privacy Tab**
3. Click the **Settings Button** in the Pop-Up Blockers Section –
  - i. The Pop-Up Blocker box should be checked off
4. Click in the **"Address of website to allow box"**
5. Enter the following address in the allow sites section **\*.ais.columbia.edu**
6. Click the **Add** Button - The address is added and appears on the box below
7. Click **Close** and then **OK** - Your settings are saved.

