

# CHAPTER 11

**Activity:** Individual

⌚ 45 MINUTES

**Materials:** Course materials, activity handout, and access to the internet

**Objective:** The purpose of this activity is for students to complete on-boarding paperwork in order to satisfy government and employer requirements. In this activity, students will:

- a. Define the terms on-boarding, form W-4, personal allowances, exemption, and form I-9.
- b. Identify types of on-boarding activities.
- c. Discuss the need to provide identification sources when taking a job.
- d. Identify acceptable sources of identification to provide an employer upon employment.
- e. Demonstrate procedures for completing on-boarding paperwork.

**STANDARD Income and Careers Standard 3:**

Describe factors affecting take-home pay.

- Explain the effect on take-home pay of changing the allowances claimed on an “Employee’s Withholding Allowance Certificate” (IRS form W-4).

**STANDARD Financial Analysis Standard:**

Understand tools, strategies and systems used to maintain, control and plan the use of financial resources.

# Employee On-Boarding

## Procedure

### Review these terms with your students:

- » **Employee on-boarding:** The process by which new employees complete necessary tax and employment verification documents; during this process, employees are also familiarized with company policies, culture and procedures
  - » **Form W-4 (Employee’s Withholding Allowance Certificate):** A federal tax form filled out by an employee to indicate the amount that should be withheld from his/her paycheck for taxes
  - » **Tax exemptions:** Amount that a taxpayer who meets certain criteria can subtract from a taxable income
  - » **Personal allowances worksheet:** This worksheet (located at the top of your W-4) allows you to further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple-jobs situations.
  - » **Form I-9 (Employment Eligibility Verification):** The purpose of this form is to verify the identity and employment authorization of individuals hired in the United States. This includes both citizens and noncitizens.
- 1 Instruct students to access and digitally complete W-4 and I-9 forms for themselves. A blank W-4 form can be found at <http://www.irs.gov/pub/irs-pdf/fw4.pdf>, and an I-9 form is located at <http://www.uscis.gov/files/form/i-9.pdf>. Ask students to print both of their completed forms, and help them determine what documents they could provide to a new employer to establish their identity and/or employment eligibility. *Students’ answers should include passport, social security card, driver’s license, military ID, birth certificate, etc.*
  - 2 After students have completed each of the forms, divide the class into small groups of 3–4 students each. Have each group develop a set of instructions for completing the W-4 and I-9 forms. Instruct students to write the instructions in “plain English” versus official federal government “speak.”
  - 3 Select the best of the different groups’ instructions and prepare copies to share with the other students. Students should keep these “plain-English” instructions for future reference.

# Employee On-Boarding

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## Directions

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Review the following terms before completing this activity.

- » **Employee on-boarding:** The process by which new employees complete necessary tax and employment verification documents; during this process, employees are also familiarized with company policies, culture and procedures
- » **Form W-4 (Employee's Withholding Allowance Certificate):** A federal tax form filled out by an employee to indicate the amount that should be withheld from his/her paycheck for taxes
- » **Tax exemptions:** Amount that a taxpayer who meets certain criteria can subtract from a taxable income
- » **Personal allowances worksheet:** This worksheet (located at the top of your W-4) allows you to further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple-jobs situations.
- » **Form I-9 (Employment Eligibility Verification):** The purpose of this form is to verify the identity and employment authorization of individuals hired in the United States. This includes both citizens and noncitizens.

- 1 Access and digitally complete W-4 and I-9 forms. A blank W-4 form can be found at <http://www.irs.gov/pub/irs-pdf/fw4.pdf>, and an I-9 form is located at <http://www.uscis.gov/files/form/i-9.pdf>. Print both of your completed forms. What document(s) could you provide to a new employer in order to establish your identity and/or employment eligibility?

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- 2 After you have completed each of the forms, break into small groups of 3–4 students each. Each group will develop a set of instructions for completing the W-4 and I-9 forms. Be sure to write the instructions in “plain English” versus official federal government “speak.”

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- 3 The best of the different groups' instructions will be selected and distributed so that you will each have simplified instructions for future use.