

## **Morning Sun of Ohio**

### **Instructions for Employees Filling Out the New Employee Packet**

Each of these forms is returned to Morning Sun Financial Services of Ohio Human Resources/Payroll Departments, unless otherwise indicated.

Included in your New Employee packet is an Employee Orientation-Welcome letter.

**1. Application for Employment-** You may have filled out an Application for Employment at the time you applied for your position. If you have already completed one there is no need to fill out a second application. Your Employer can provide Morning Sun with a copy of that application.

Please complete all sections of the application to the best of your ability and sign and date the last page of the application. **This form is required.**

**2. New Employee/Employee Change Notification** – This is a critical form which assists us in establishing and maintaining current worker records for payroll and other administrative purposes.

You must notify your Employer whenever there is a change in your contact information (including address, phone number etc.) The Employer must complete and submit this form to Morning Sun of OH whenever there is a change in an employees' information or status, including, name, contact info, wage changes, and notice of an employees' separation. **This form is required.**

#### **To Complete the New Employee Notification:**

The **Employee** should complete the section titled "Personal Information" with their name as it appears on their Social Security Card, address ( this is where you want your payroll checks or other correspondence to be mailed to), phone number, social security number and birth date.

The **Employer** should check one of the boxes in the top section and then complete the section titled "Employment Information" if "Employee Termed" has been checked.

Both the Employer and the Employee must sign and date at the bottom of this form.

**New Employee Tax Information** - A Household Worker is a person that is employed by an individual to do work in the individuals own home. Most Household Workers are required to have employment taxes withheld from their paychecks but there are some exceptions. The information collected within this section will allow Morning Sun to determine if you are exempt from certain employment taxes. **This information is required.**

**3. W-4** – This form will be used to instruct the payroll system how to tax your wages and withhold the appropriate taxes based on those earnings. If the W-4 is sent to the Morning Sun incomplete Morning Sun will need to send the form back for completion of the missing information. If you are unsure of how to fill out this form to claim the appropriate withholding based on your earnings, please see instructions on top of form and follow the step by step calculations. Morning Sun can only advise you on how to fill out the form. No advice can be given as to the number of allowances you should claim. Please contact your tax advisor for help in determining the number of allowances to claim.  
**This form is required.**

**To Complete the Form W-4:**

Box 1- fill in the bottom third of the form with your first name, last name, and home address.

Box 2- fill in your social security number

Box 3- check the box that applies to your marital status.

Box 4- check this box if the name on your social security card is different than the name in Box 1. Note: Morning Sun is required to report your earnings under the name on your social security card.

Box 5-Enter the total number of allowances you are claiming. If you are unsure of the number, please answer questions A thru H on the top portion of the W-4.

The following walks you through the Personal Allowance Worksheet A thru H

- a. Enter a '1' to count yourself
- b. Enter a 1 for yourself if you have one job, or you are married and have one job and your spouse does not work, or you have wages from a 2<sup>nd</sup> job or your souses wages (or total of both) is \$1500.00 or less.

- c. Enter a “1” for your spouse. If your spouse works and you have more than one job between you, you may enter “0” on line C. This may avoid having to little tax withheld.
- d. Enter the number of children you can claim as dependents on your tax return.
- e. Enter “1” if you are ale to file your tax return as “Head of Household”
- f. Enter “1” if you will have at least \$1900.00 in child care or dependent care expenses that you plan to claim on your tax return.
- g. Enter 2 for each child if your income is less than \$65000.00 (\$95,000.00 if married). Then minus “1” if you 3 to 7 children, minus “2” if you have 7+ children.
- h. Add lines A-G. This is the number you would enter in Box 5. If you are still unsure, please read the entire W-4 document.

Box 6-Enter any additional withholding dollar amounts you want withheld from each payroll check. This must be in dollars, a percent cannot be accepted.

Box 7-If you are answering “Exempt” in box 7, Box 5 should be blank. Note: if you answer Exempt in box 7, there will be no federal withholding taxes deducted from your payroll checks. Please consult your tax advisor if you are unsure.

The employee should sign and date the W-4

**4. Ohio Form IT-4-** this form is required by the State of Ohio to determine the amount of Ohio state withholding taxes that need to be withheld from your wages. If the IT-4 is sent to the Morning Sun incomplete Morning Sun will need to send the form back for completion of the missing information. If you are unsure of how to fill out this form to claim the appropriate withholding based on your earnings, please see instructions on top of form and follow the step by step calculations. Morning Sun can only advise you on how to fill out the form. No advice can be given as to the number of allowances you should claim. Please contact your tax advisor for help in determining the number of allowances to claim.

**This form is required.**

**To Complete the Form IT-4**

- a. Print your full name
- b. Print Social Security number

- c. Fill in your home address and zip code-this should be your physical address not a PO Box
- d. Fill in your Public School District if known
- e. Fill in your School District number if known
- f. Enter 1 for a personal exemption for yourself-only if you claimed yourself on your last 1040 tax return
- g. If married enter 1 for your spouse – only if claimed on your last 1040 tax return
- h. Enter the number of Exemptions for dependents claimed on your last 1040 tax return.
- i. Add the number of exemptions on lines 1, 2 and 3.
- j. Enter additional amount of withholding per period if choosing this option.
- k. Sign and date the form IT-4

**5. Direct Deposit/Pay Card Enrollment** –The fastest and most efficient way for a worker to receive their pay is to enroll in either Direct Deposit or a Pay Card. Either one of these options will guarantee you will receive your pay on the expected pay date rather than waiting for a check to arrive by mail. Please complete this form to choose how you would like to receive your pay.

**To Complete the Direct Deposit/ Pay Card Enrollment:**

- a. Complete all information asked on page 2 of the Enrollment Form.
- b. If you are choosing to receive your pay on a MasterCard Pay Card, fill in the Global Cash Prepaid MasterCard section. When Morning Sun receives your enrollment form, a pay card will be mailed out to you to the address you have provided in the Employee Authorization section along with activation instructions.
- c. If you are choosing to have your pay deposited into your own checking or savings account, fill in the section titled “Direct Deposit”. **You must attach a voided check or a letter from your bank that provides your bank routing number and your personal account number. Please write “VOID” across your check.**
- d. Sign and date the form
- e. If you feel your best option is to receive a check in the mail, please check the box just below your signature.
- f. If you do not complete this form you will receive your pay by receiving a check in the mail.

**7. Employment Eligibility/I-9/ E-Verify**— all new employees are required to present proof of employment eligibility and complete an Immigration and Naturalization Service "Employment Eligibility Verification (Form I-9)" upon hire. Please fill out all of Section 1. You must show the proper forms of identification to your employer. **This form is required.**

**To Complete the Employment Eligibility Form I-9:**

**The Employee-Section 1.**

- a. Print your last name, first name, and home address.
- b. Fill in the box requesting your date of birth
- c. Fill in the box requesting your social security number
- d. Fill in your email address and telephone number- these are optional.
- e. Place a check in the box that best states your personal status
- f. Sign and date where it says "Employee Signature"

**The Employer-Section 2.**

- a. The Employer will show the worker page 9 of the form I-9 and instruct the worker to provide either one document from List A, or one document from List B and List C.
- b. The Employer may not ask for a specific document.
- c. When the worker has provided a List A or List B and C document, the Employer will log under the appropriate column the document type, number, and expiration date (if there is one) for all documents received.
- d. A photocopy of each document will need to be made and included with the submission of the I-9 to Morning Sun.
- e. The date these documents were reviewed should be included in the section titled CERTIFICATION.
- f. This section must be completed within three business days of hire.
- g. The Employer should than sign, print their name, title (owner, employer), business address (usually the participants address) and date.

**\*You must submit a photocopy of your I-9 documents to Morning Sun Financial Services of Ohio!**

**\*Morning Sun of Ohio will use the information provided on the Form I-9 to verify employment eligibility through E-Verify the US Department of Homeland Security.**

**7. Medicaid Fraud Form- This form is required.**

**8. Employer/Employee Agreement Form** – You as the Provider/Employee will fill in on information requested on page one of the agreement and sign and date page 2. Your Employer or their Authorized Representative will also sign and date this form. **This form is required**

**9. The IRS Notice 797** is provided to each new Worker hired. This notice provides the worker with information about the Federal Earned Income Credit and how to identify if you qualify for this credit when you file your personal tax returns.

**10. Timesheets and instructions** on how to fill out the timesheet and a Payroll Schedule will be sent to you once you have been approved by Morning Sun to begin work. Please review the instructions on how to complete your timesheet. The Payroll schedule will tell you what the pay periods are, when your timesheet needs to be submitted for payment and when you will get paid for those hours worked. Your Employer may choose to have you submit your timesheets using Morning Sun's Web Based Timesheet Portal. If your employer has chosen to use this option, you will be notified and given a tutorial to use to complete and submit your timesheet on-line.

**\*All timesheets must be submitted to Morning Sun for processing well before the 6 month deadline or you risk not getting reimbursed. Morning Sun must submit timesheet reimbursement request to the Managed Care Organization no later than 6 months from the pay period begin date on the timesheet.**