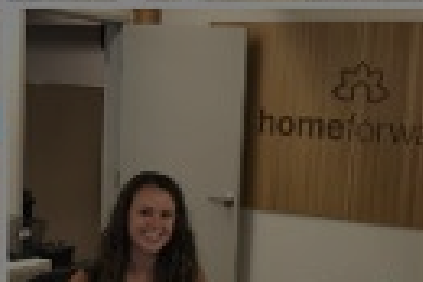
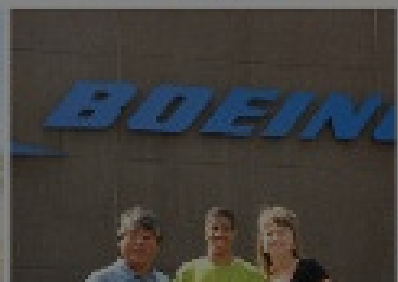
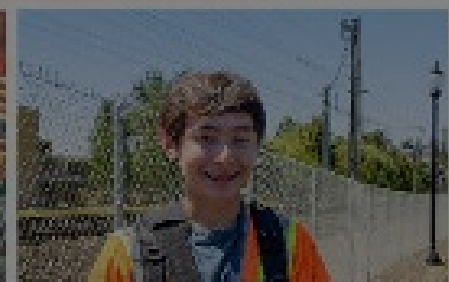
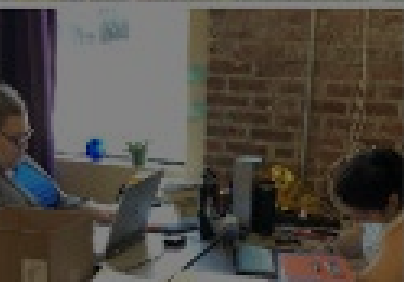


SummerWorks Hiring Workshop

Disclosures, Timesheets, Taxes, and I-9 Documentation



Session Topics

Here's what we'll cover in today's session.

- 1 Introduction**
Welcome / Introductions
- 2 Payroll Overview**
Setting up your profile in the payroll system and information about getting paid
- 3 Participant Acknowledgements**
How we share your information, waived benefits, Covid-19, and confidentiality
- 4 Taxes and the W-4 Form**
Taxes and payroll deductions
- 5 I-9 Verification**
A form which establishes your identity and eligibility to work in the U.S.

Disclaimers and Cautions



Paperwork Completion

All of the paperwork in today's session must be completed in order for you to work.



Eligibility Check

To complete the hiring process, you will be asked to visit a location and show documents that establish both your identity and eligibility to work in the United States.

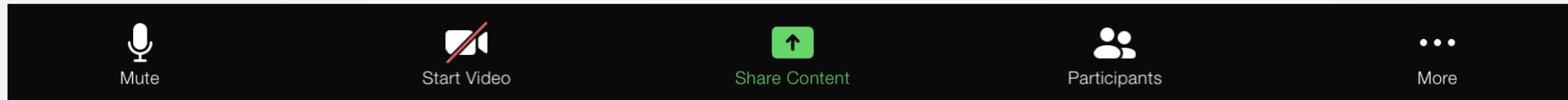


Tax Information

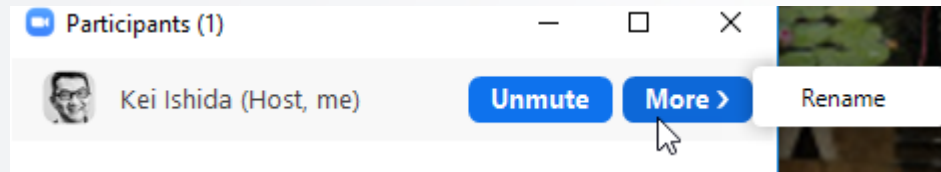
In this session, we'll provide general information on how to fill out the W-4 Form. This information isn't intended to replace the advice and guidance of a tax professional or a parent or guardian.

Using Zoom

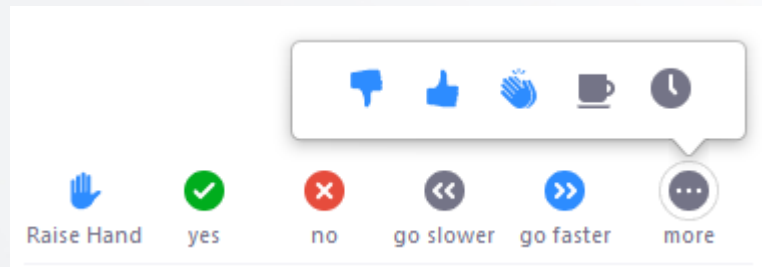
Zoom menu



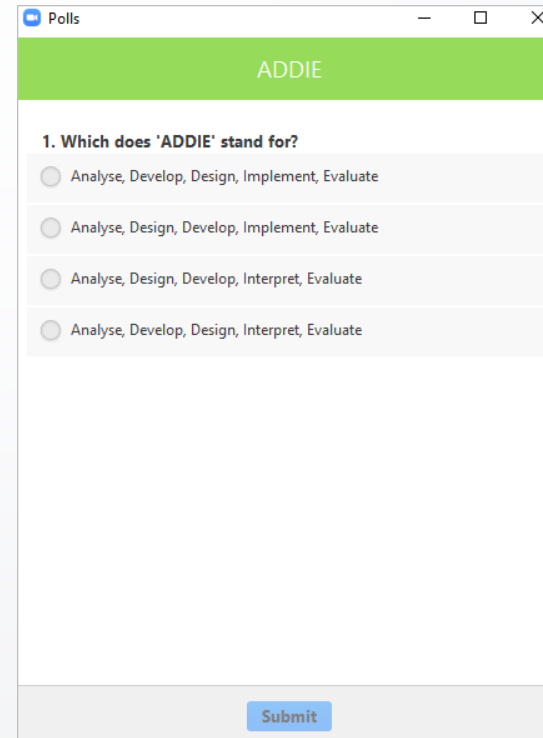
Update your name



Nonverbal feedback



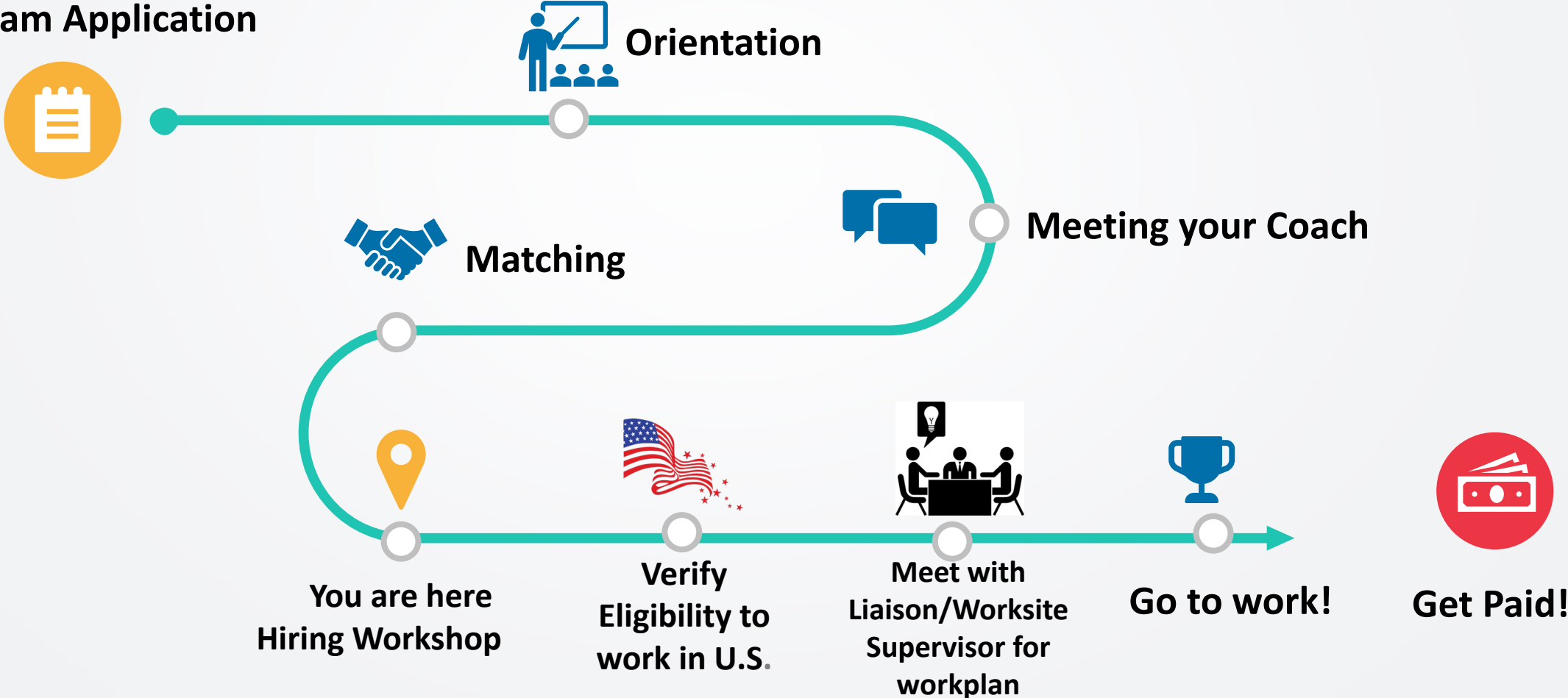
Polling



You Are Here

Congratulations on making it this far! Let's remember all that you've accomplished to get here.

Program Application



Payroll Overview

How to get paid for the time you worked.



Step 1: Account Set Up

You will need an account in the payroll system to record your time worked. We'll set that up today!

Step 2: Payment Options

Your options for getting paid are Pay Card or Direct Deposit.


Step 3: Enter Hours

Record hours worked in the payroll system **on Sunday** each week.

Step 4: Get Paid

Your pay will be deposited in your bank account (direct deposit) or on your Pay Card **every other Monday**.

Payroll Account Set Up

Register Log in

Enter an Application for SummerWorks.

Enter a Pin Number

You need a pin number provided by SummerWorks to enter a new application.

SummerWorks Application Pin #:

Social Security #:^{*}

(Please enter numbers only)

Date of Birth:^{*}

Continue

Payroll Account Set Up



[Register](#) [Log in](#)

Enter an Application for SummerWorks.

Application Information

Please fill out the information below and click continue.

Social Security #:	XXX-XX-5555
Date of Birth:	XX/XX/XXXX
First Name:*	<input type="text"/>
Middle Initial:	<input type="text"/>
Last Name:*	<input type="text"/>
Gender:*	<input type="text"/>

Continue

Payroll Account Set Up

Please fill out the information below and click continue.

Street Address:*

Apartment #:

City:*

State:*

Zip Code:*

Home Phone:

Cell Phone:*

Email:*

School:*

Continue

Payroll Account Set Up



[Register](#) [Log in](#)

Enter an Application for SummerWorks.

Login Information

Please fill out the information below and click continue.

Login Name:

Password:

Retype Password:

[Continue](#)

Payroll Account Set Up

Cell Phone Number: 5031234567
Email: youremail@email.com

Login Info [\(Edit\)](#)

Login: youremail@email.com

To complete your application please re-enter your SSN and Birth Date

Social Security #:^{*}

(Please enter numbers only)

Date of Birth:^{*}

Submit



Participant Site

Started

ants! You can use this site to enter
e sheets, view your hours, sign up
t deposit and view your W2
tion. But first, you must register
ate a login for this site.

ter »

Enter Hours

Participants! You can use this site to enter
your time and submit your time sheets.

Login »

Enter Application

Some participants will enter their basic
info before they register and create a
login.

Start »

More Information

To get more information about the
program, click on the link below

Learn more »

Activity: Set Up Your Payroll Account

You will have 5-10 minutes to complete the following activity:

- 1 Go to <https://www.summerworkspayroll.org/>
- 2 Click the **START** button under **Enter Application**
- 3 Complete your registration information. **Make note of your password.**
- 4 When you have finished, type in the chat: “Account created!”

Need Help?

Raise your hand!
We'll invite you into a
Breakout room.

Step 2: Payment Options

Direct Deposit or VISA Pay Card

JOHN DOE 1234
1234 MAIN ST
FRESNO, CA 93711

DATE _____ 1234

PAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS

Central Valley Community Bank

MEMO _____ MP

⑆ 121137726 ⑆ 1234 567 890000 ⑆

Routing No. Check No. Account No.



Step 2: Pay Cards

Pay Cards will be given to all participants who do not successfully sign up for Direct Deposit.



Step 2: Pay Card Activation

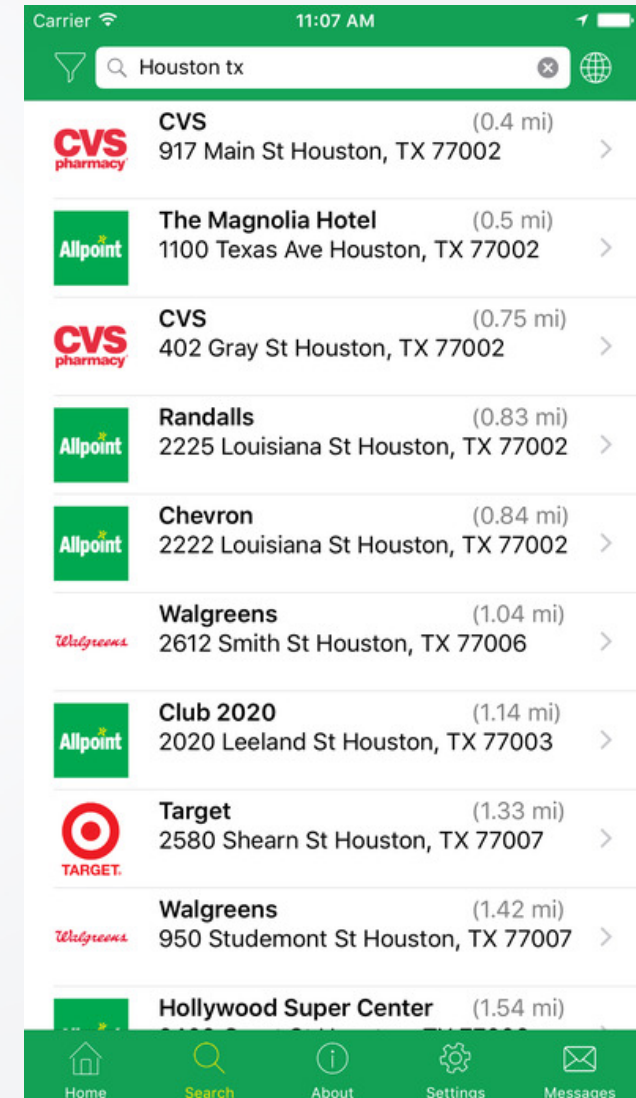
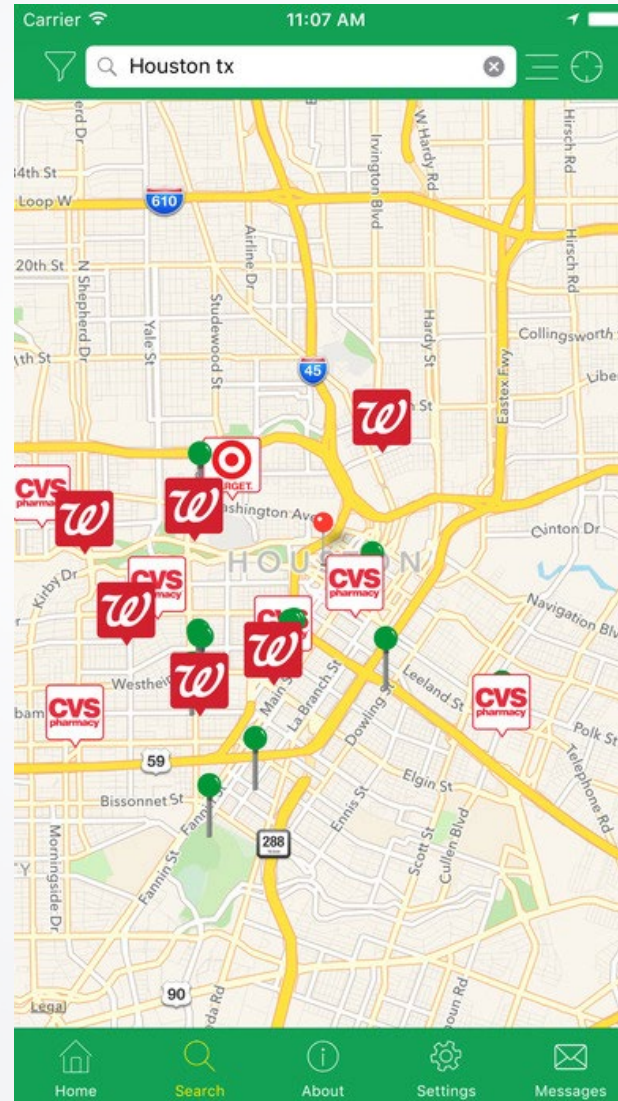
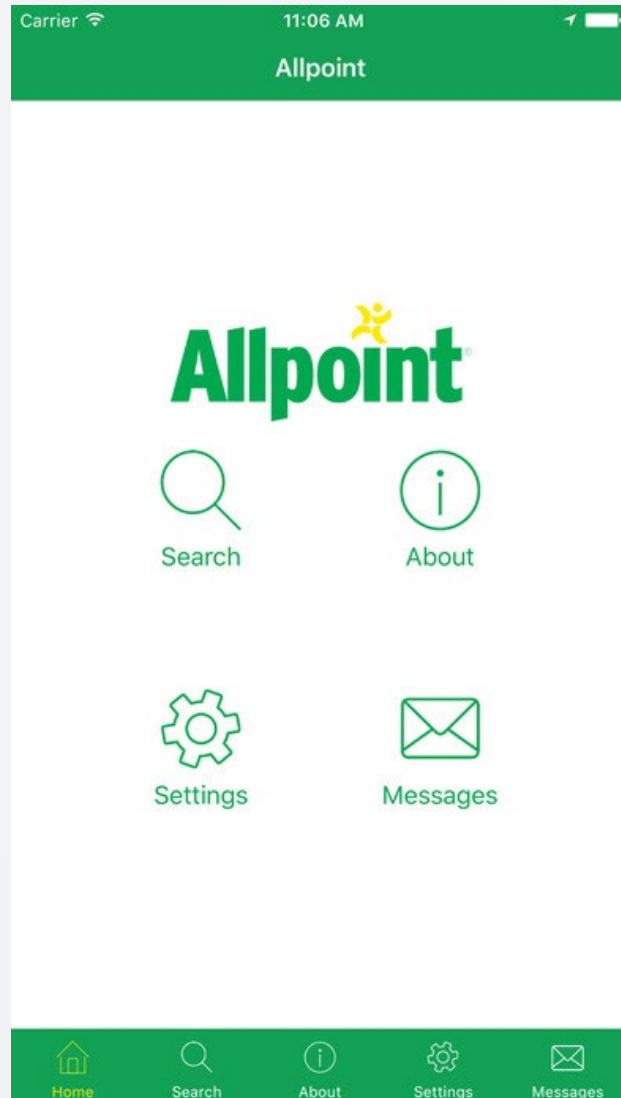
- Open the envelope
- Call the number on the card
- Or, go to www.paychekplus.com
- Enter the 16 digit card number
- Enter your 8 digit date of birth – month, day, year
- Enter the last 4 digits of your SSN
- Select a PIN (Easy for you, hard for someone else to guess!)
- Ready to use!

Step 2: Pay Card Transaction Types

- Store Purchases
 - With or without cash back
- Teller Withdrawal
- Transfer to Bank Account
- Savings Option
- ATM Withdrawal

Step 2: Pay Card AllPoint ATM App

Use Allpoint ATM to take out \$\$ without fees!

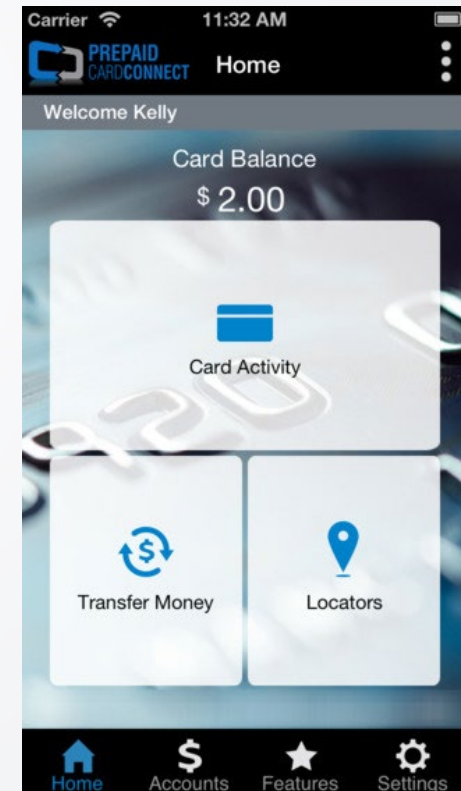
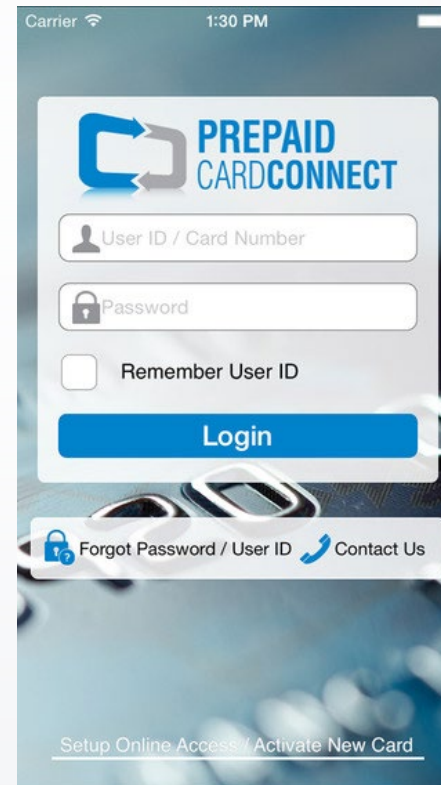


Step 2: Pay Card

Prepaid Cardconnect App

Use Prepaid
Cardconnect App to
check your balance
and track card activity!

4



MICHAEL F. JAMISON
(123)456-7890
123 OAKRIDGE DRIVE
YOUR CITY, STATE 12345

00-00/000

1001

20

PAY
TO THE
ORDER OF

\$

DOLLARS



Security features
are included
on all checks.

YOUR FINANCIAL INSTITUTION
YOUR TOWN, USA

FOR

MP

① 234567801

000 23456

1001

ABA / Routing #

Account #

Step 1

Locate these #'s on your own checks to set up Direct Deposit.

Step 2: Direct Deposit Sign Up

Direct Deposit

Participant Direct Deposit Signup for SummerWorks Program

Direct Deposit Signup

SummerWorks 2017

Step 1 of 3

Setting up direct deposit for the SummerWorks 2017 is simple. All you will need is your bank's ABA routing number and your savings or checking account number. Direct deposit is one of the fastest ways you can receive your paycheck. If you wish to be paid by direct deposit, you must sign-up online with your account information. We will verify your account information with a test. If we can't verify your account information, we will not be able to pay you by direct deposit. We will get paid on time. Due to the short nature of the program we cannot accommodate changes to your selected method of pay.

Bank Name:

Bank ABA Number (Routing Number):

Your Bank Account Number:

Account Type:

Please enter your Direct Deposit Information

Continue

Cancel

Select "Direct Deposit" from the Menu, fill out the information and select "Continue."

2400
91-548/1221

PAY TO THE ORDER OF: _____ \$ _____
DOLLARS

FOR _____

① 22105278② ③ 6724301068④ 2400⑤

Routing Number Account Number Check Number

Step 2: Direct Deposit

Direct Deposit

Participant Direct Deposit Signup for SummerWorks Program

**WE WILL TEST YOUR ACCOUNT
SET UP**



Direct Deposit Signup

Congratulations! You have signed up for direct deposit for the SummerWorks 2017. We will test your account on or before the next payroll. If the account test fails, you will be issued and paid with a payroll card.

**If test fails, you will get paid on a paycard until
direct deposit is corrected.**

Activity: Set Up Direct Deposit

You can complete this on your own or with the help of your coach.


- 1 Go to <https://www.summerworkspayroll.org/>
- 2 Log onto your account.
- 3 Enter your bank information
- 4 When you have finished, raise your hand in the Zoom chat.

The image shows a check form from Central Valley Community Bank. The payee is JOHN DOE, 1234 MAIN ST, FRESNO, CA 93711. The amount is 1234. The check number is 1234. The routing number is 121137726. The account number is 567 890000. The form includes fields for 'PAY TO THE ORDER OF', 'DATE', '\$', 'DOLLARS', 'MEMO', and 'MP'. A security icon is also present.

JOHN DOE
1234 MAIN ST
FRESNO, CA 93711

DATE _____ 1234

PAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS  Security features included. Details on back.

Central Valley Community Bank

MEMO _____ MP

⑆ 121137726 ⑆ 1234 567 890000 ⑆

Routing No. Check No. Account No.

Step 3: Enter Hours

Maximum of 8 Hours per Day, 40 Hours per Week
Ask Coach if you need help!

Hello, erin3 Information Time Sheets Hours Pay Direct Deposit W2 Logout

Enter Time Sheet

Enter Time Sheet for SummerWorks Program

Provider: Immigrant & Refugee Community Organization Week: 6/20/2017 - 6/26/2017 Maximum Hours Per Week: 40

Clear Save Exit

Time Sheet for John Smith

Monday 6/20/2017	Tuesday 6/21/2017	Wednesday 6/22/2017	Thursday 6/23/2017	Friday 6/24/2017	Saturday 6/25/2017	Sunday 6/26/2017	Total Hours
8.00	8.00	8.00	8.00	0.00	1.00	2.00	35.00

Enter in how many hours you have worked for each day, and select "Save."
Please Note: No more than 8 hours can be worked on a day, and 40 hours worked per week.

Step 3: Enter Hours – **Closest 15 minutes**

For example: 5 minutes = .25

30 minutes = .50

45 minutes = .75

- If you worked 4 hours and 13 minutes, you would put 4.25
- If you worked 7 hours and 26 minutes, you would put 7.50
- If you worked 5 hours and 47 minutes, you would put 5.75

Step 4: Timesheet Entry **EVERY SUNDAY**

GET PAID

EVERY OTHER MONDAY

Monday, August 17

If you work next week

Monday, August 31

Monday, Sept. 14

Monday, Sept. 28

Monday, Oct. 12

Session Topics

Here's what we'll cover in today's session.

1

Introduction

Welcome / Introductions

2

Payroll Overview

Setting up your profile in the payroll system and information about getting paid

3

Participant Acknowledgements

How we share your information, waived benefits, Covid-19, and confidentiality

4

Taxes and the W-4 Form

Taxes and payroll deductions

5

I-9 Verification

A form which establishes your identity and eligibility to work in the U.S.

Participant Acknowledgements:



**Authorization to Share
Personal Information**

Permission to share information between us, your coaching agency, and the work site. We need to do this to better support you.



**Benefits
Waiver**

Work experiences in this program are not eligible for benefits or unemployment insurance.



**Covid-19
Acknowledgement**

Acknowledging the risks associated with COVID-19 and taking appropriate safety measures as outlined by the Emergency Protocol in the SummerWorks handbook.

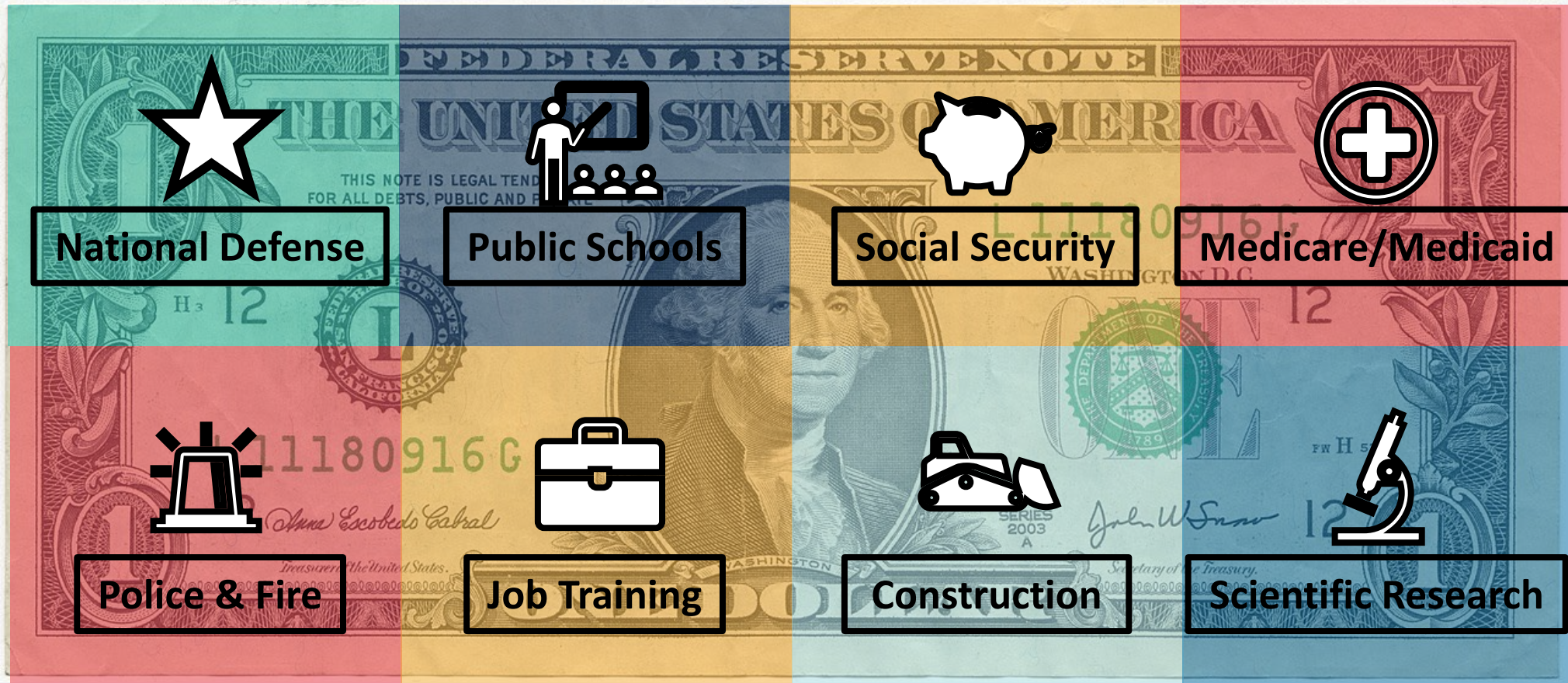


**Confidentiality
Agreement**

You agree to keep information that you learn about the company you are working for confidential.

Taxes

Taxes are fees that you must pay on the money you earn. Taxes that are deducted from your pay are used by the government (both federal and state) to pay for programs and services for us all. Here are some examples of what your taxes pay for:



Taxable Marital Status: Married
Exemptions/Allowances:
Federal: 3, \$25 Additional Tax
State: 2
Local: 2

JANE HARPER
101 MAIN STREET
ANYTOWN, USA 12345

1

<u>Earnings</u>	<u>rate</u>	<u>hours</u>	<u>this period</u>	<u>year to date</u>
Regular	15.192	40.00	607.68	17,324.64
Overtime	22.788	1.50	34.18	649.09
Holiday	—	—	—	478.50
Vacation	15.192	40.00	607.68	945.22
Bonus	—	—	—	20.00
Frost	—	—	—	644.54
Gross Pay			\$1,249.54	19,961.69

Important Notes

EFFECTIVE THIS PAY PERIOD YOUR REGULAR HOURLY RATE HAS BEEN CHANGED FROM \$14.102 TO \$15.192 PER HOUR.

WE WILL BE STARTING OUR UNITED WAY FUND DRIVE SOON AND LOOK FORWARD TO YOUR PARTICIPATION.

2

<u>Deductions</u>	<u>Statutory</u>	<u>year to date</u>
Federal Income Tax	- 79.81	1,305.77
Social Security Tax	- 75.73	1,304.41
Medicare Tax	- 17.94	304.90
Anytown State Income Tax	- 43.88	742.58
Anytown Local Tax	- 27.39	465.63
<u>Other</u>		
401(k)	- 12.50*	212.50
FSA	- 5.00*	85.00
Commuter Trip	- 7.00*	-119.00

3

Example of
ADP Pay Stub

W-4 Step 1: Enter Personal Information

Form W-4 Department of the Treasury Internal Revenue Service	Employee's Withholding Certificate		OMB No. 1545-0074
	<p>▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.</p>		2020
Step 1: Enter Personal Information	(a) First name and middle initial	Last name	(b) Social security number
	<div style="background-color: yellow; height: 20px; width: 100%;"></div>	<div style="background-color: yellow; height: 20px; width: 100%;"></div>	<div style="background-color: yellow; height: 20px; width: 100%;"></div>
	Address		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
	<div style="background-color: yellow; height: 20px; width: 100%;"></div>		
City or town, state, and ZIP code			
<div style="background-color: yellow; height: 20px; width: 100%;"></div>			
(c) <input type="checkbox"/> Single or Married filing separately			
<input type="checkbox"/> Married filing jointly (or Qualifying widow(er))			
<input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)			

- This step is required for everyone.
- Double check that the name matches your Social Security Card.
- Make sure that the Social Security Number is entered correctly.
- Check the appropriate box in section (c).

FILING STATUS:

SINGLE: Not married, legally separated or widowed with no dependents.

MARRIED FILING JOINTLY: Couples that have wed before the end of the tax year who will combine their income and file one tax return together.

HEAD OF HOUSEHOLD: You paid more than half of the cost of keeping up a home for yourself and a dependent.

W-4 Step 2: **Two Jobs or You & Spouse Work**

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

Step 2: Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Multiple Jobs or Spouse Works Do **only one** of the following.

- (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); **or**
- (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**
- (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

- This step is used by those that are Married Filing Jointly AND whose spouse works.
- If you're both working and earn a similar amount, check the yellow box at end of line (C).
- If you have 2 jobs or if your spouse is working (AND earns a different amount than you), do the worksheet on page 3 of W-4 Instructions. (see link in chat)

W-4 Step 3: Claim Dependents

Step 3: Claim Dependents	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
	Multiply the number of qualifying children under age 17 by \$2,000 ▶	\$ <input type="text"/>	Total will autofill
	Multiply the number of other dependents by \$500 ▶	\$ <input type="text"/>	
	Add the amounts above and enter the total here		



- This step is used by those that are filing as Head of Household OR Married Filing Jointly With Kids.

W-4 Step 4: Other Adjustments

Step 4 (optional): Other Adjustments	(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income	4(a) \$ <input type="text"/>
	(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here	4(b) \$ <input type="text"/>
	(c) Extra withholding. Enter any additional tax you want withheld each pay period .	4(c) \$ <input type="text"/>

- This step is optional for **EVERYONE**.
- Line (a) - Used for those that have additional income, like interest from a bank account, stock dividends, or retirement income.
- Line (b) – General rule is that if you don't own a house or have any large medical bills, you would leave this blank. You can use the worksheet on Page 3 if you are unsure.
- Line (c) – If you think that you are not withholding enough, you can opt to withhold more here.

W-4 Step 5: Sign the Form

Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
	  Employee's signature (This form is not valid unless you sign it.) Date

- This step is required for everyone.
- Sign and date the form. The form is invalid without a date.
- The Employer fills out the Employers Only section.

OREGON W-4: Worksheet A

Worksheet A – Personal allowances

A1. Enter "1" for **yourself** if no one else can claim you as a dependent. Otherwise, enter -0-..... A1.

Text

A2. Enter "1" for your **spouse** if your spouse **doesn't work**. Otherwise, enter -0-..... A2.

Text

A3. Enter the number of **dependents** you will claim on your Oregon tax return..... A3.

Text

A4. Add lines A1 through A3. Enter the result here and follow the instructions below..... A4.

f_x



Complete all worksheets that apply.

- **Worksheet B**—Use this worksheet if you plan to do **any** of the following on your 2020 Oregon return:
 - o Itemize your Oregon deductions or claim additional standard deduction amounts.
 - o Claim federal adjustments to income or Oregon additions, subtractions, or credits (other than personal exemption credits).
 - o Report nonwage income (such as dividends, interest, or self-employment income).
- **Worksheet C**—Use this worksheet if you (including your spouse) have more than one job **and** the combined earnings from **all** jobs exceed \$20,000.

If neither of the above worksheets apply, stop here and enter the number from line A4 on Form OR-W-4, line 2.

OREGON W-4: Certificate

Form OR-W-4

Oregon Employee's Withholding Statement and Exemption Certificate

2020

First name	Initial	Last name	Social Security number (SSN)	<input type="checkbox"/> Redetermination	
Address			City	State	ZIP code

Note: Your eligibility to claim a certain number of allowances or an exemption from withholding may be subject to review by the Oregon Department of Revenue. Your employer may be required to send a copy of this form to the department for review.

1. **Select one:** Single Married Married, but withholding at the higher single rate.

Note: Check the "Single" box if you're married and you're legally separated or if your spouse is a nonresident alien.

2. **Allowances.** Total number of allowances you're claiming on line **A4**, **B15**, or **C5**. If you meet a qualification to skip the worksheets and you aren't exempt, **enter -0-**.....2.

3. **Additional amount**, if any, you want withheld from each paycheck..... 3.

4. **Exemption from withholding.** I certify that my wages are exempt from withholding and I meet the conditions for exemption as stated on page 2 of the instructions. Complete **both** lines below:

• Enter the corresponding exemption code. (See instructions)..... 4a.

• Write "Exempt" 4b.

I-9 Section 1

Proves Identity and Eligibility to Work in the U.S.



▶ **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)

Last Name (Family Name)		First Name (Given Name)		Middle Initial	Other Last Names Used (if any)		
Address (Street Number and Name)			Apt. Number	City or Town		State	ZIP Code
Date of Birth (mm/dd/yyyy)	U.S. Social Security Number [] [] [] - [] [] - [] [] [] []		Employee's E-mail Address			Employee's Telephone Number	

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

<input type="checkbox"/> 1. A citizen of the United States		
<input type="checkbox"/> 2. A noncitizen national of the United States (See instructions)		
<input type="checkbox"/> 3. A lawful permanent resident (Alien Registration Number/USCIS Number): _____		
<input type="checkbox"/> 4. An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy): _____ Some aliens may write "N/A" in the expiration date field. (See instructions)	QR Code - Section 1 Do Not Write in This Space	
Aliens authorized to work must provide only one of the following document numbers to complete Form I-9: An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.		
1. Alien Registration Number/USCIS Number: _____		
OR		
2. Form I-94 Admission Number: _____		
OR		
3. Foreign Passport Number: _____		
Country of Issuance: _____		

Signature of Employee	Today's Date (mm/dd/yyyy)
-----------------------	---------------------------

DocuSign Email:

Complete 4 Forms: Participant Acknowledgement, Fed W-4, Oregon W-4, I-9 Eligibility to Work in U.S.



DocuSign NA4 System <dse_NA4@docusign.net>

To: Cindi Schulke

If there are problems with how this message is displayed, click here to view it in a web browser.

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Right-click or tap and hold here to download...

Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

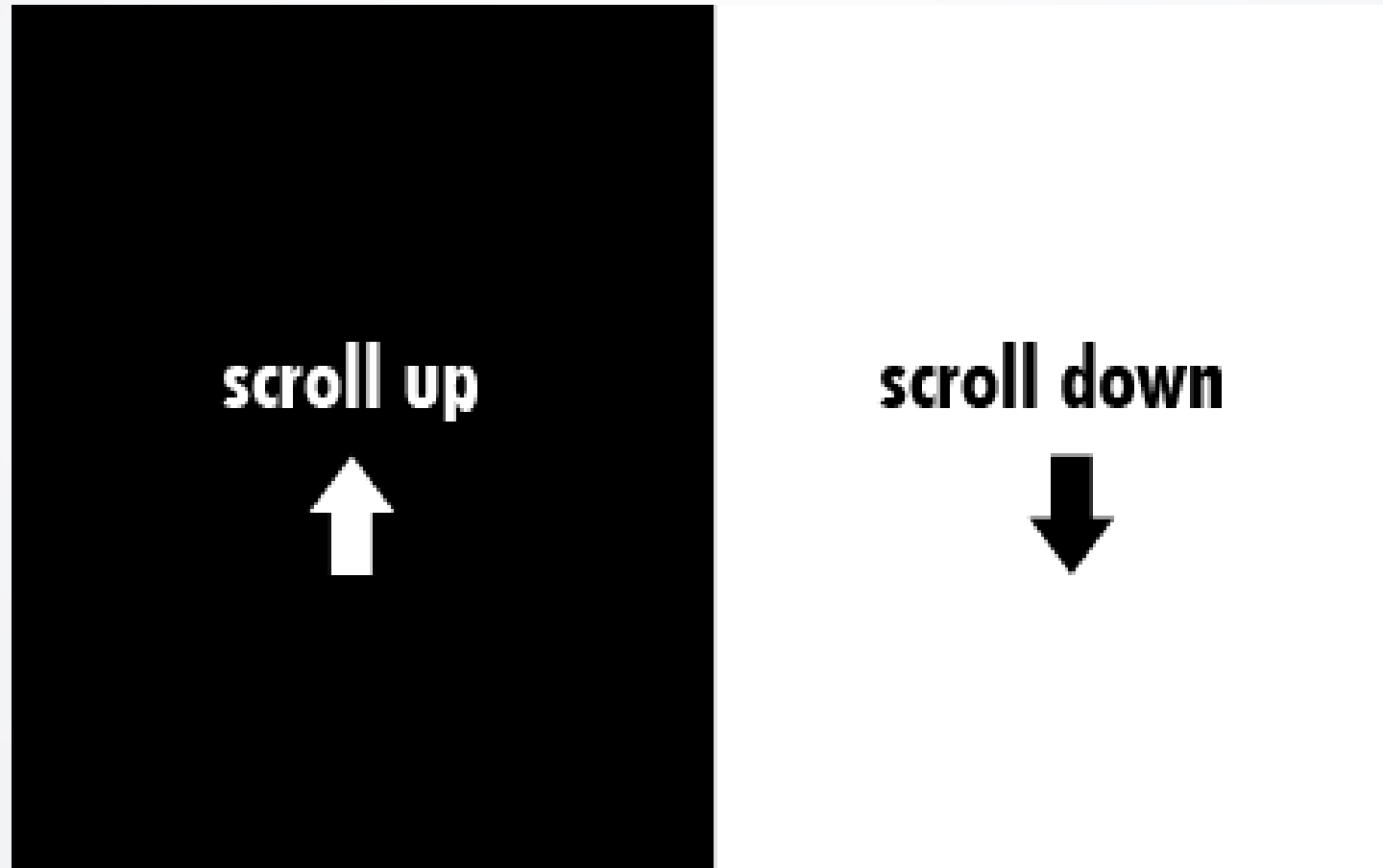
Cindi Schulke sent you a document to review and sign.

[REVIEW DOCUMENTS](#)

Cindi Schulke

cschulke@worksystems.org

Use Scroll Up & Down with Smart Phone



Activity 1: Fill Out the DocuSign Forms

You will have 10 minutes to complete these four forms!

- 1 Sign SummerWorks Acknowledgements Form
- 2 Complete Federal W-4
- 3 Complete Oregon W-4
- 4 Complete I-9 Eligibility to Work in US
- 5 When you have finished, type in the chat: “DocuSign done!”



Session Topics

Here's what we'll cover in today's session.

- 1** Introduction
Welcome / Introductions
- 2** Payroll Overview
Setting up your profile in the payroll system and information about getting paid
- 3** Participant Acknowledgements
How we share your information, waived benefits, Covid-19, and confidentiality
- 4** Taxes and the W-4 Form
Taxes and payroll deductions
- 5** **I-9 Verification**
Documenting that you are able to work legally in the United States

I-9 Form Process

To complete the I-9 process, you are required to bring your Identification / Documents to your appointment so that they can be verified in person.

Step 1: Complete the I-9 Form in DocuSign

Step 2: Make an appointment

Step 3: Bring your ID / Documents to the appointment

Activity: Make An Appointment for I-9 Verification

You will have 5 minutes to make your appointment!

- 1** Go to: <https://www.eventbrite.com/e/summerworks-i-9-verification-tickets-119185829023>
- 2** Choose an appointment time
- 3** Enter your name and email address
- 4** Add the appointment to your calendar
- 5** When you have finished, type in the chat: “Appointment made!”

Step 3: Go to Your Appointment

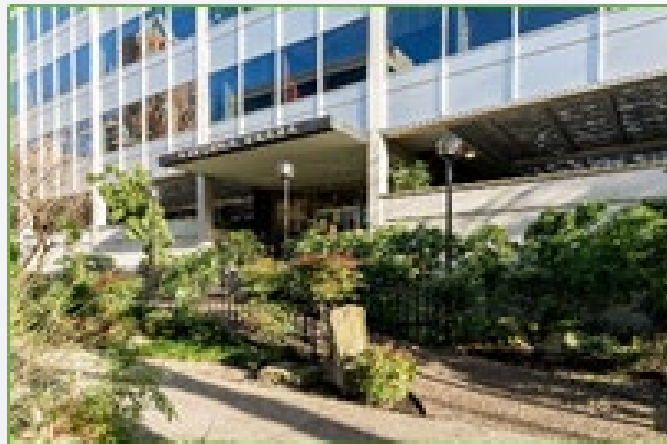
1

Worksystems Address

Riviera Plaza

1618 SW First Avenue

Portland OR 97201



2

Wear your mask!

3

Bring your ID/docs!



You have completed the Hiring Workshop!

Remember you **CANNOT** start working
until we see your I-9 docs!

