



## Request for Temporary Records ID Trainee/Employee Determination Checklist

Email Form

Reset Form

(Revised January 2015)

This checklist is to assist in determining the nature of the payment to an individual and is required for all temporary identification number requests. The payment classification is required by Payroll Services prior to IRSS assisting the non-resident alien (NRA) in processing either an ITIN (Individual Taxpayer Identification Number) or in requesting a SSN (social security number).

### Individual Information

Name:  Date of Birth:  Blazer ID:

Foreign address:

*(Required for year-end documents)*

Has the NRA ever applied for an ITIN or SSN?  NO  YES

Is the NRA a student?  NO  YES If yes, please provide the student number:

### Assignment Information

Hire Date:  End Date:  Organization:

Job Title:  Assignment Category:

### Departmental Contact Information

Name:  Email Address:  Campus#:

Please answer True or False to the following questions:

The individual is on campus to be mentored by a member of our faculty or to participate in an approved training program.

Effort is expended with the end result being strictly related to academic achievement.

Continued appointment is contingent mostly upon academic standing and progression.

The task performed by the individual are **NOT** critical to the operation of the institution.

Effort being expended is **NOT** subject to periodic review and non-academic criteria for continuation.

Timesheets are **NOT** required by the supervisor nor is the work subject to effort reporting.

The individual is **NOT** performing services for compensation from external research resources (i.e. research project; R01)

The financial contract for the funding sources(s) agrees that scholarships are allowable expenses.

Please Fax (975-7417) or email (tax@uab.edu) the **completed checklist** along with a **copy of the award letter, passport visa page** and work **authorization document (e.g. 1-20 or DS2019)**.