



TEXAS STATE UNIVERSITY
Human Resources

APRIL 21, 2026

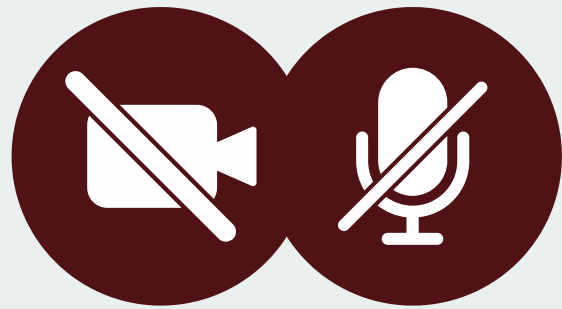
HR CONNECTIONS





TEXAS STATE UNIVERSITY
Human Resources

HOUSEKEEPING RULES



Your microphone and camera are automatically off.



Submit your questions using the Q&A button located at the bottom of your Zoom screen.



Avoid putting questions in the chat, as they may not be seen by our presenters



AGENDA

Welcome

Asanti Wiley

Employee Engagement Survey Initiative

Janet Gibbon & Allyson Nwinye

Development Day

Samantha Williams

Nepotism and Related Employment

Katie Bonner & Alicia Barthel

Talent Acquisition Updates

Deana Townsend

Form I-9 and Hireright Reminders

Jessie Ortiz

Performance Review Launch

Cindy Keilers

Updates from Presidential Events

Holly Hirsch

FY27 Budget Development

Cynthia Landeros

Reviewing Your W-4

Madeline Davila

UFCU

Brian Garcia & Joshua Edwards

Employee Childcare Needs Survey

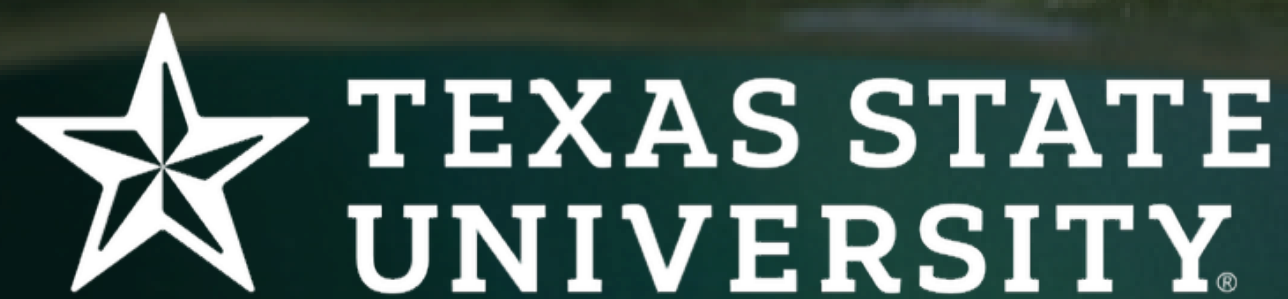
Brett Last



JANET GIBBON & ALLYSON NWINYE

TEXAS STATE UNIVERSITY EMPLOYEE ENGAGEMENT SURVEY INITIATIVE

GALLUP



GALLUP®

PROJECT OVERVIEW

➤ 1

PROJECT KICKOFF

Align on objectives

The project has been kicked off. We have aligned on the objectives guiding this work and have mapped out an implementation plan moving forward.

➤ 2

SURVEY DESIGN

Finalize survey and integration

Gallup will work with the TXST team to finalize the HRIS list and conduct an accuracy check. Gallup works iteratively with the TXST team to finalize the survey instrument, leveraging Gallup's database and, potentially, historical questions TXST has asked before.

➤ 3

DATA COLLECTION

Survey employees

Gallup will survey an attempted census of employees from September 21 to October 2. Live progress reports will be available throughout the data collection period to enable TXST to assess leading and lagging subpopulations.

➤ 4

ANALYSIS REPORTING

Deliver results

Gallup will make all data available in Gallup Access.

Gallup will prepare an executive presentation detailing the major findings from the survey, including how TXST compares to other higher ed institutions and how results differ within the TXST community.


➤ 5

ACTION PLANNING

Move from insight to action

Gallup will facilitate Access training and action planning trainings that help managers/leaders understand how to create a plan.

Creating a **healthy educational experience** is about building one in which **faculty and staff members and students** are able to bring their **whole selves to work and school**. It requires higher education leaders commit to the principles of employee engagement for their faculty and staff members and to invest in their employees' and students' career, physical, financial, social and community wellbeing.

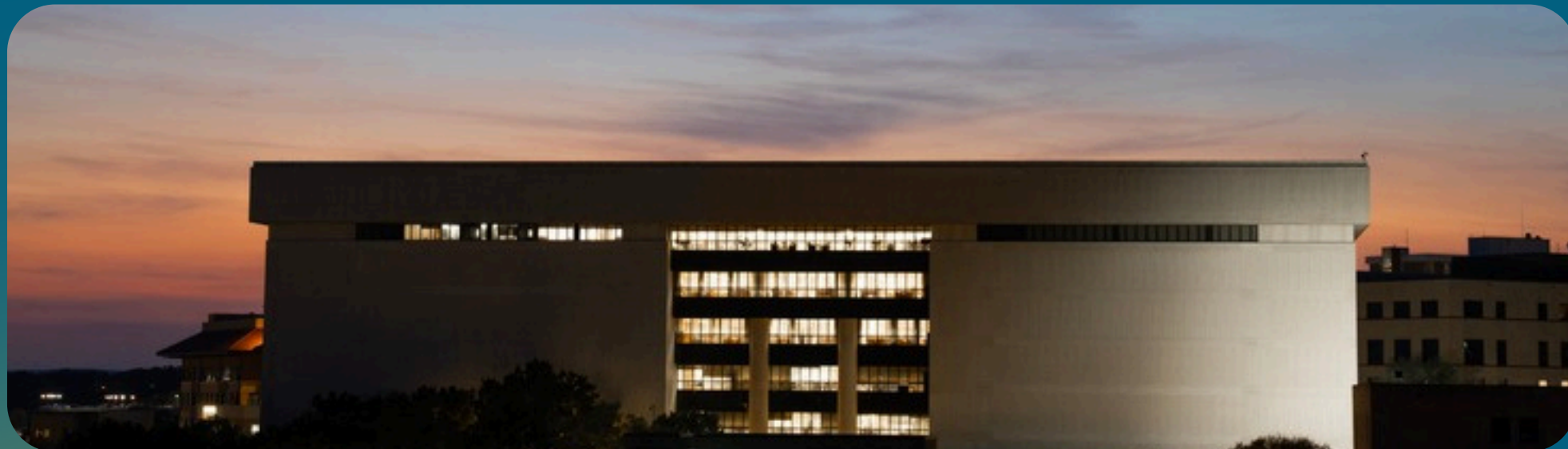


EMPLOYEE ENGAGEMENT

Employee engagement is the involvement and enthusiasm of employees in their work and workplace. Employees can become engaged when their basic needs are met and when they have a chance to contribute, a sense of belonging, and opportunities to learn and grow.

Engaged Employees:

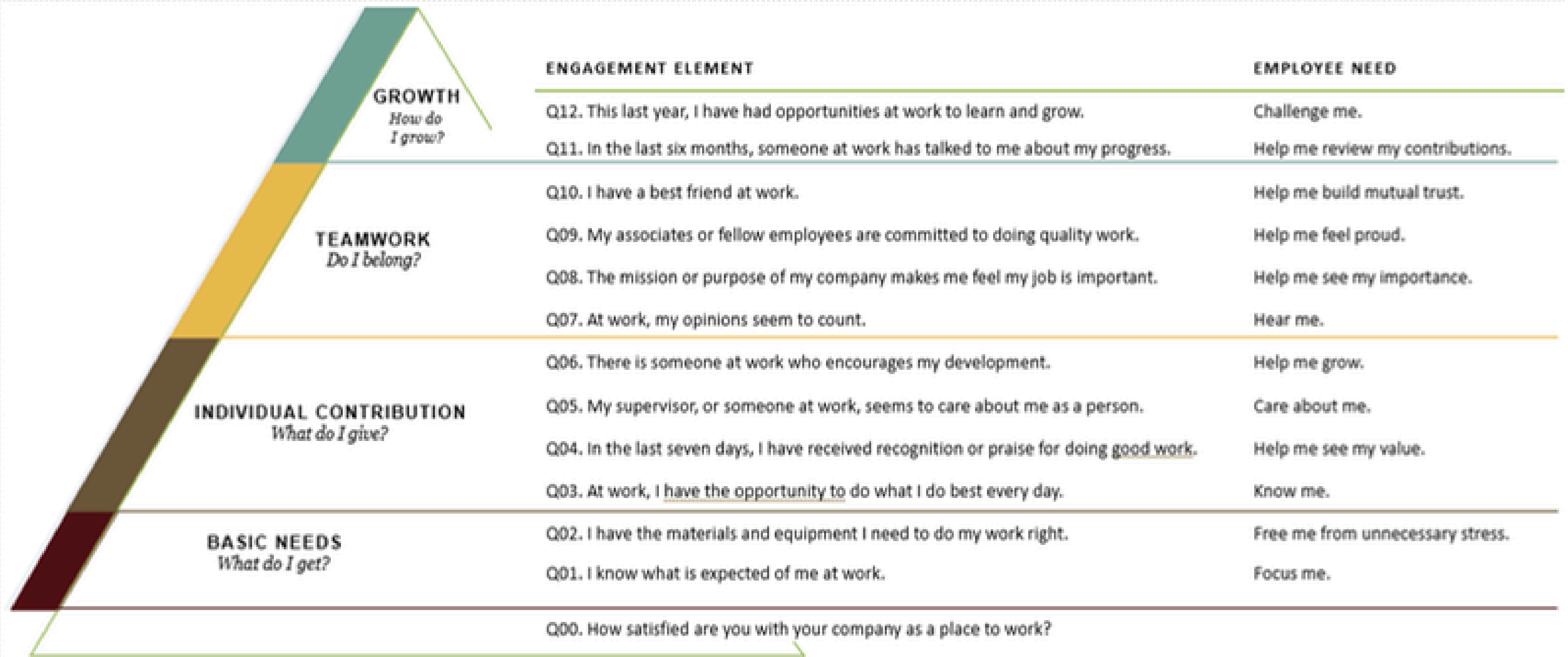
- know the scope of their job
- thrill in the challenge of their work every day
- are in roles that use their talents
- always look for new and different ways of achieving the outcomes of their role



ENGAGEMENT ≠ SATISFACTION



THE GALLUP Q12®



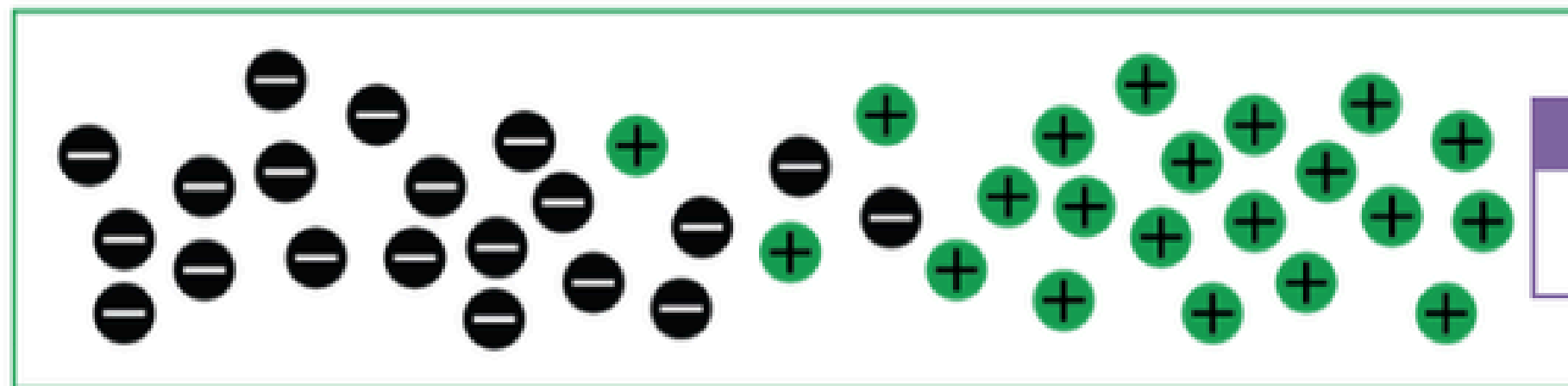
FINDING WHICH CONDITIONS MATTER: THE SORTING EFFECT

Each element was selected based on its ability to distinguish — or sort — high-performing teams from low-performing teams.

+ High Performers - Low Performers

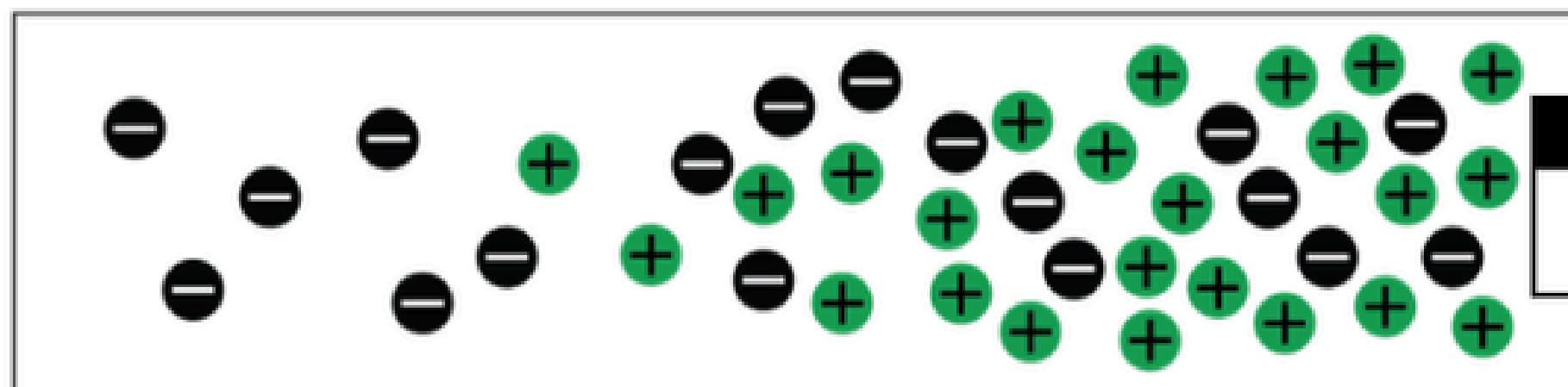
STRONGLY DISAGREE

STRONGLY AGREE



Great Item

I have a best friend at work.



Poor Item

I have a good friend at work.

GALLUP'S Q12® WAS DEVELOPED WITH ORGANIZATIONAL OUTCOMES IN MIND

Work groups in the top quartile of Gallup's engagement database have ...

▼
41%

**LOWER
ABSENTEEISM**

▼
24%

**LOWER
TURNOVER**
(in high-turnover organizations)

▼
59%

**LOWER
TURNOVER**
(in low-turnover organizations)

▼
28%

**LESS
SHRINKAGE**

▼
70%

**FEWER SAFETY
ACCIDENTS**

▼
58%

**FEWER PATIENT
SAFETY INCIDENTS**

▼
40%

**FEWER QUALITY
INCIDENTS**
(defects)

▲
10%

**HIGHER
CUSTOMER
METRICS**

▲
17%

**HIGHER
PRODUCTIVITY**

▲
21%

**HIGHER
PROFITABILITY**

... when compared with bottom-quartile units.

DEFINING ENGAGEMENT ACROSS ALL HIGHER EDUCATION INSTITUTIONS

Among Faculty and Staff Nationally

ENGAGED EMPLOYEES

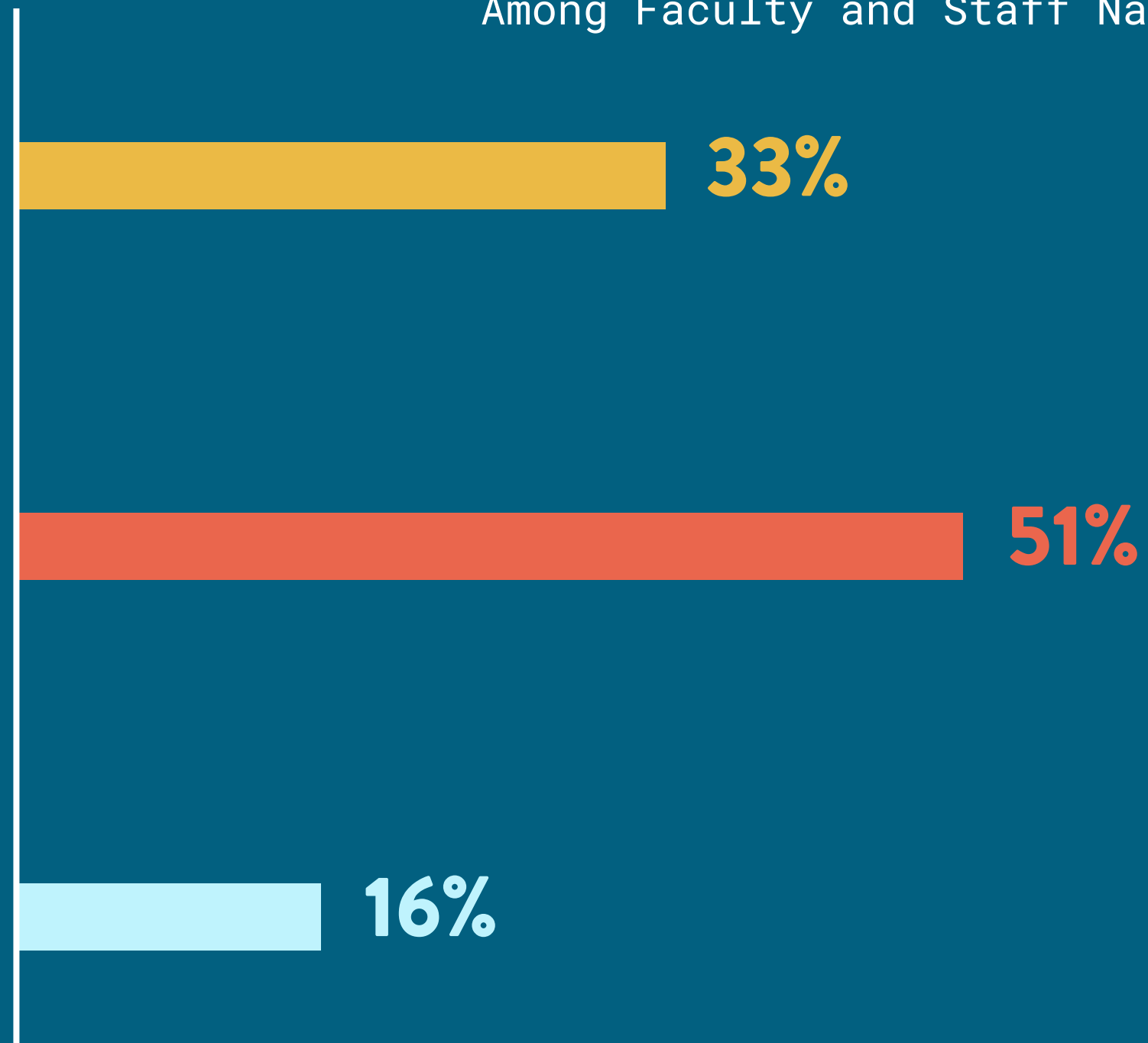
are highly involved in and enthusiastic about their work and workplace. They are psychological “owners,” drive performance and innovation, and move the organization forward.

NOT ENGAGED EMPLOYEES

are psychologically unattached to their work and company. Because their engagement needs are not being fully met, they’re putting time — but not energy or passion — into their work.

ACTIVELY DISENGAGED EMPLOYEES

aren’t just unhappy at work — they are resentful that their needs aren’t being met and are acting out their unhappiness. Every day, these workers potentially undermine what their engaged coworkers accomplish.



DEFINING ENGAGEMENT FOR GALLUP PARTNERSHIPS IN HIGHER EDUCATION

ENGAGED EMPLOYEES

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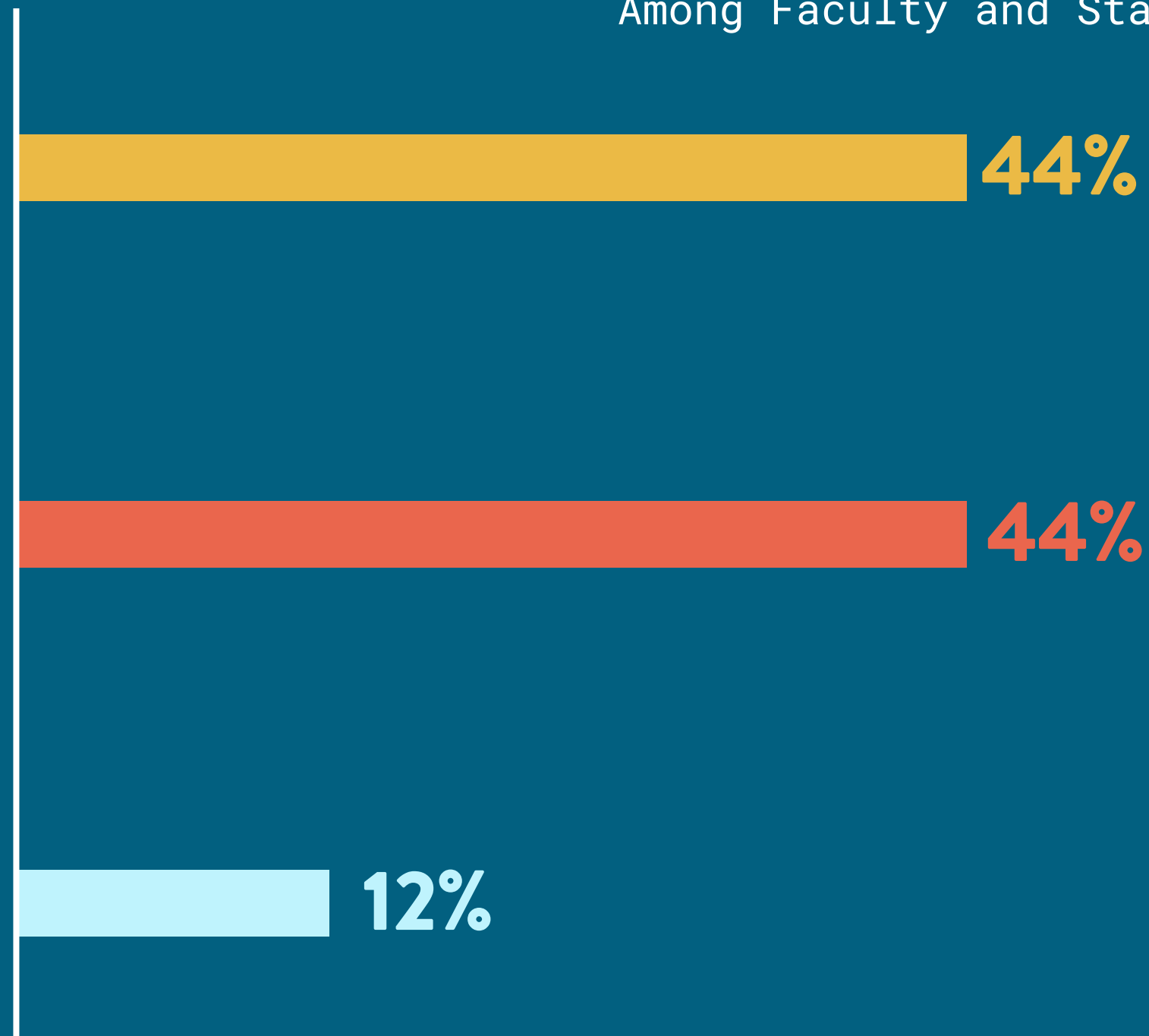
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ACTIVELY DISENGAGED EMPLOYEES

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Among Faculty and Staff



GALLUP BENCHMARKING CAPABILITIES

57.1
MILLION
RESPONDENTS

230,000
HIGHER EDUCATION EMPLOYEES

5.1
MILLION
EMPLOYEES IN
LARGE ORGS

9.5M
WORKGROUPS

8,255
CLIENTS

212
COUNTRIES

127
INDUSTRIES

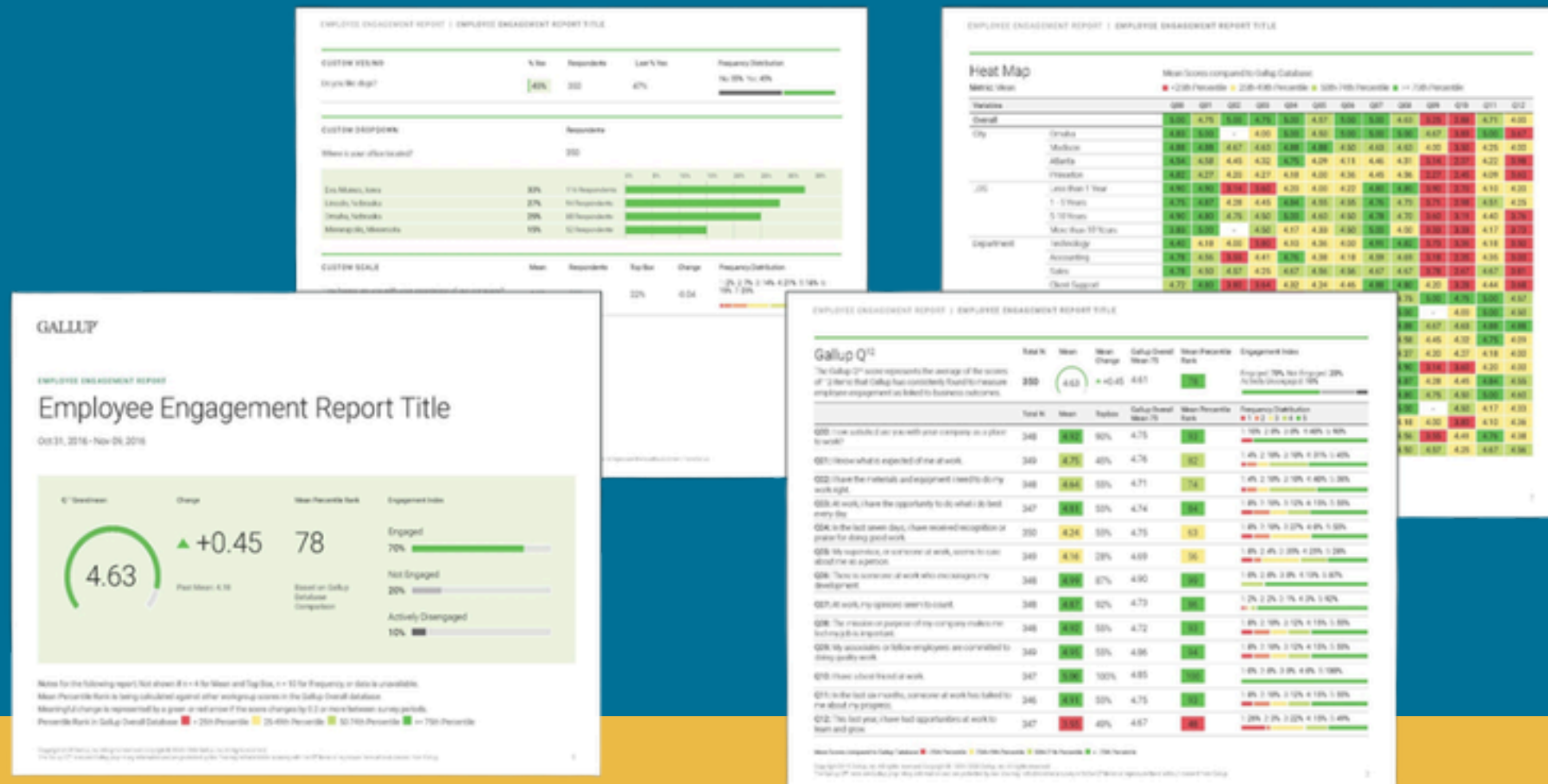
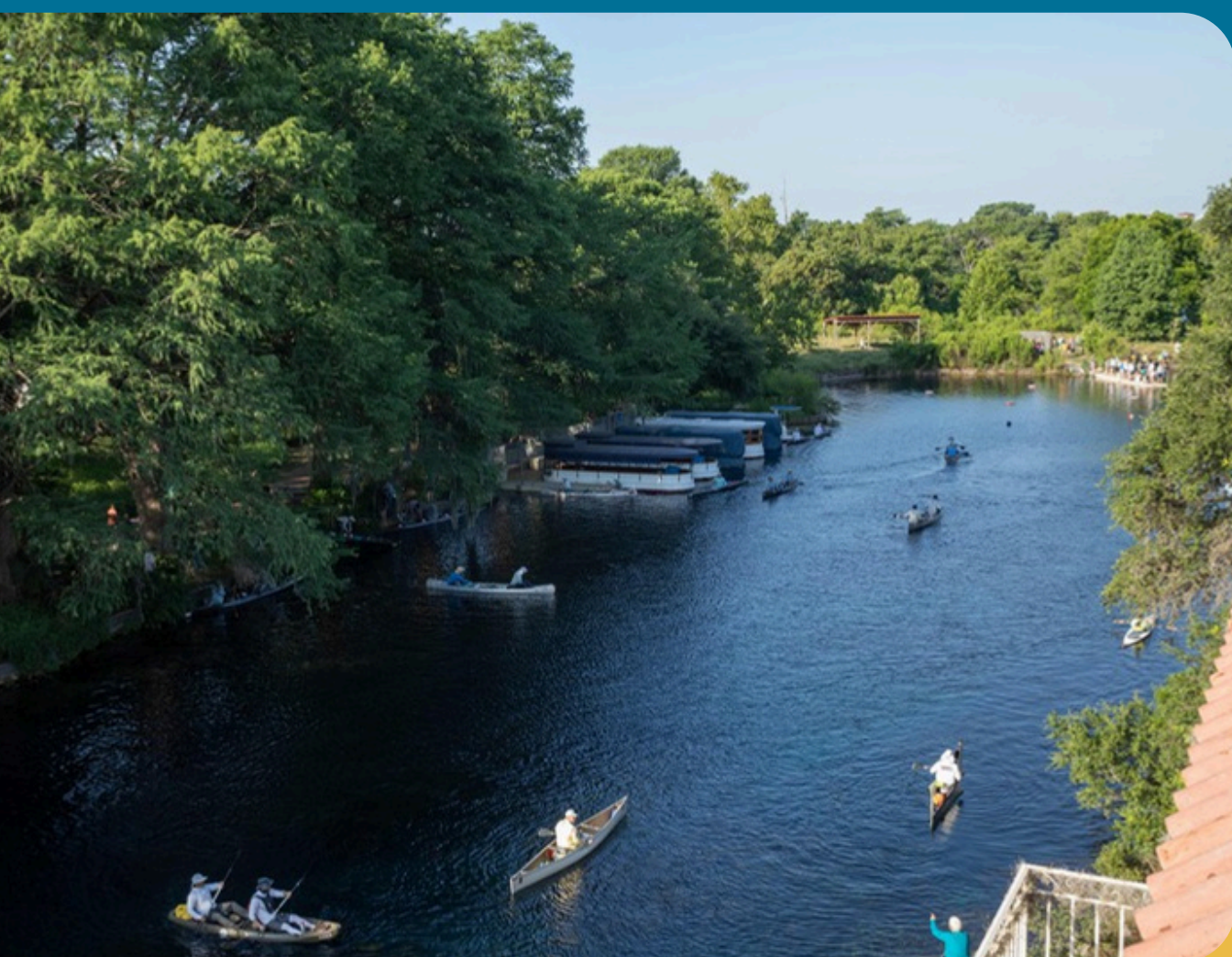
POTENTIAL DATABASES OF INTEREST:

- Higher Education Overall
- First Administration
- Management Levels
- Tenure Levels
- Academic Medical Centers

GALLUP DOES NOT:

- include non-census data
- include data more than five years old
- include non-client, general population data
- create databases without an appropriate comparison group

ANALYSIS & REPORTING



- **integrated** survey, reporting, action planning and learning platform
- user-friendly **action planning tools** that link to business outcomes or key TXST goals
- **learning resources** embedded into reports and tools for easy access
- **in-platform translations** of survey items and reporting features

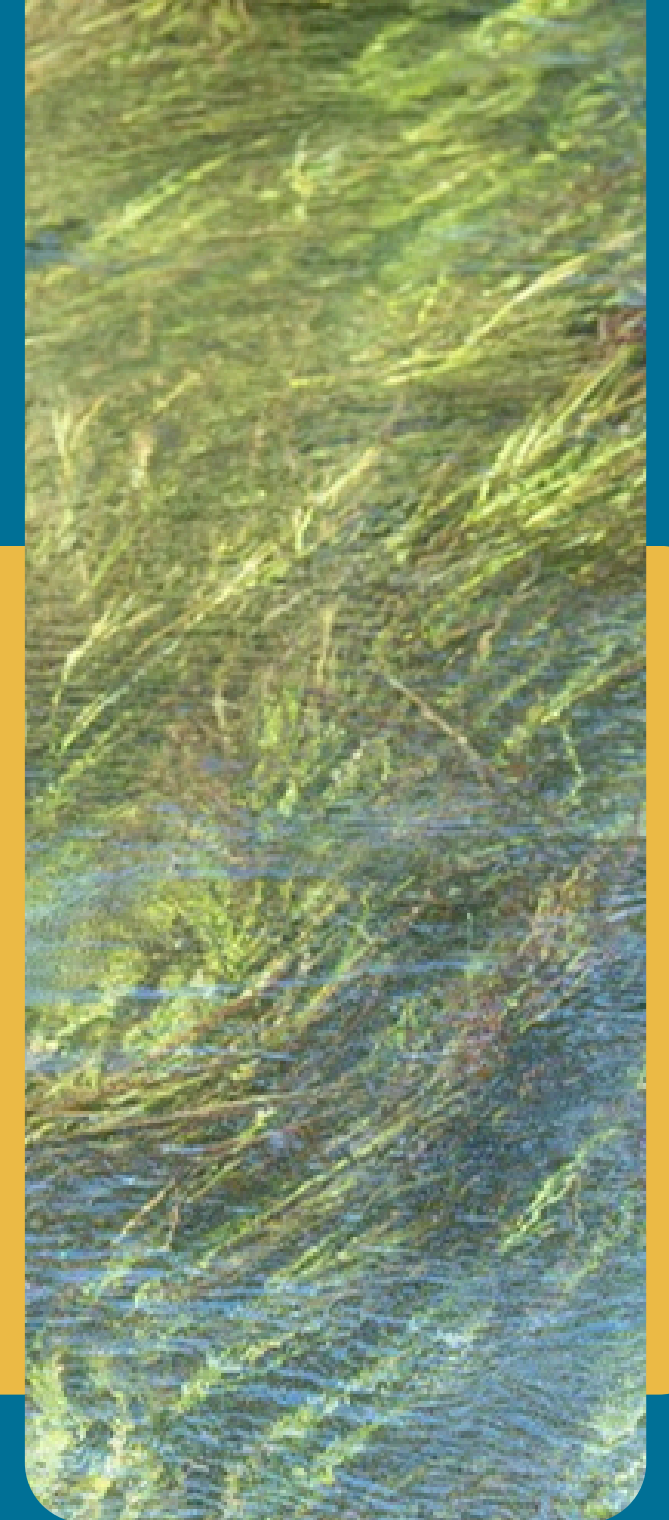
- access to user-friendly reports for an **unlimited number** of users and managers
- **advanced reporting** capabilities for super-users or analytics team members
- unlimited **self-service pulse** survey capability
- access to 375+ of Gallup's **empirically validated items** and indexes

ACTION PLANNING

Measurement is the foundation, and not the culmination, of a process to create real change.

THE GALLUP ACCESS PLATFORM INCLUDES:

- action planning guides for each engagement element
- practical action planning process and guidance for managers and leaders
- an online tool to access action planning best practices
- an online tool for managers to record action plans and follow up on progress
- an online tool for leaders to track organizational action planning progress and view analytics on action plan areas of focus and completion status



QUESTIONS?

Submit your questions using the Q&A button located at the bottom of your Zoom screen.



GALLUP®



SAMANTHA WILLIAMS

DEVELOPMENT DAY

TALENT DEVELOPMENT & COMMUNICATIONS



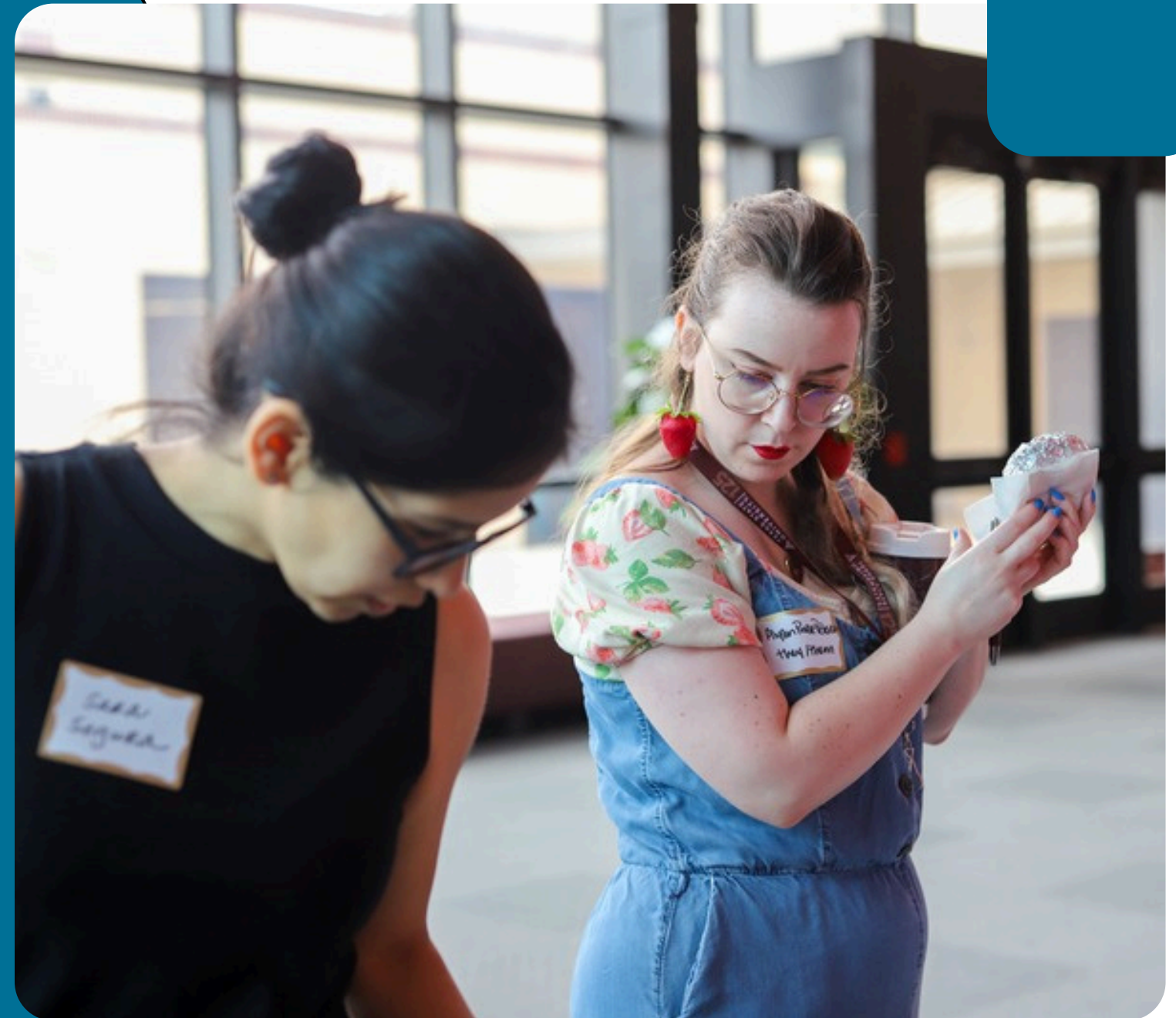
5TH ANNUAL DEVELOPMENT DAY

When: Wednesday, May 27 from 8:30 a.m. – 4:30 p.m.*

Where: In-person (LBJ Grand Ballroom / Avery 256) &
Live-Streamed Virtually via Zoom

Event Details & RSVP – visit [website](#)

**Afternoon will be fully virtual via Zoom*



SAVE THE DATE



5TH ANNUAL DEVELOPMENT DAY

2026 KEYNOTE SPEAKER: PATRICK TERRY OF P TERRY'S

Concurrent Track Themes:

- Bobcat Employee Essentials
- Talent Management
- Workplace Well-Being & Engagement



SAVE THE DATE

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KATIE BONNER & ALICIA BARTHEL

NEPOTISM AND RELATED EMPLOYMENT

HUMAN RESOURCES



NEPOTISM AND RELATED EMPLOYMENT

Even though [Government Code Ch. 573](#) does not prohibit a person's appointment, the president must approve in advance the employment of a person related within the second degree of affinity or the third degree of consanguinity to another employee if 1) such employment causes one relative to have a direct supervisory relationship over the other relative; or 2) such employment causes one relative to have authority over the salary or other terms of employment of the other.

All employees are required to report persons in their own division who are related within the second degree of affinity or the third degree of consanguinity using the SAP Portal self-service application. Reporting is required upon initial employment and as any changes occur.

The following departments will ensure that all individuals hired at Texas State meet the university's nepotism policy requirements:

Responsible Administrator	Category of Employee
Provost and Vice President for Academic Affairs	Faculty
Talent Acquisition	Director of Non-faculty, except students
Department Chair or Director	Faculty, non-faculty, students

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DEANA TOWNSEND

TALENT ACQUISITION UPDATES

TALENT ACQUISITION



PROCESS CHANGES

NEW DRIVING VERIFICATION PROCESS IS LIVE

- This applies to positions that require driving as a condition of employment
- Driving Checks will be conducted as part of the pre-employment screening process
- You must attach the Driving Verification Release form to the hiring proposal before submitting for TA-Review
- The Driving Verification Release form can be found on the HR Forms page or under the Useful Links section of the PeopleAdmin Home screen

COMING SOON:

- The PeopleAdmin workflow transition PCR Pending will change to Filled
- Implementation of PeopleAdmin Onboarding documents, including the Welcome Letter, Acknowledgment of University Policies, and Confidentiality Agreement
- New reference check form and guidance
- PeopleAdmin automated email updates
- NSNR hiring workflow in PeopleAdmin

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JESSIE ORTIZ

FORM I-9 AND HIRE RIGHT REMINDERS

TALENT ACQUISITION & HRIS

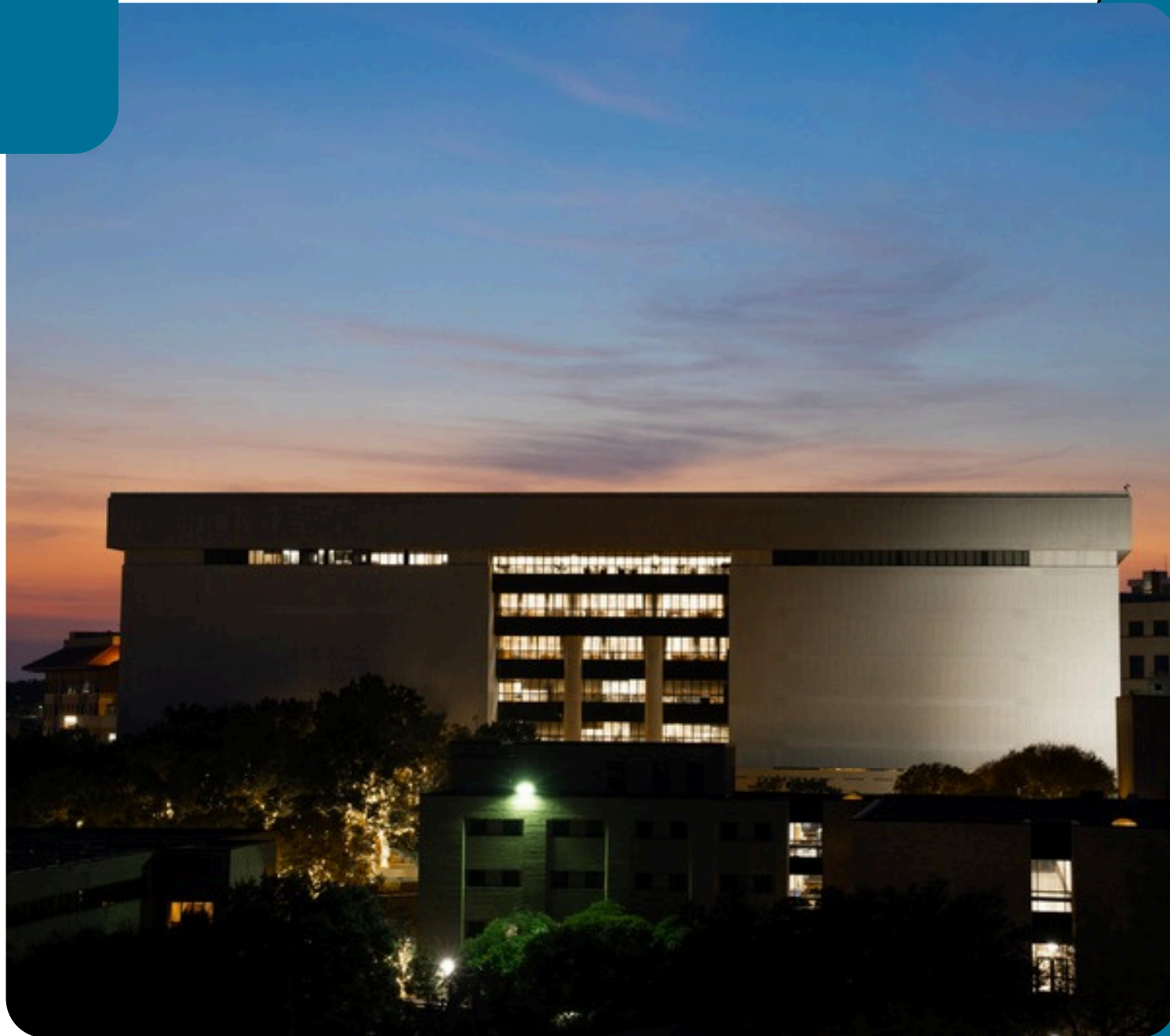


EMPLOYEE ASSIGNED WORKSITES

With summer hiring approaching, if you need to view a rehire in your worksite, please contact us via email or the Onboarding Teams channel to have the employee's Form I-9 moved to the correct worksite in HireRight.

Assigned Worksite ⓘ

Human Resources



HOW TO RESEND SECTION 1 TO EMPLOYEE ON HIRERIGHT

If the employee did not receive the Section 1 email or entered incorrect information, search for the employee in HireRight, open the I-9, and select the “Task History” section.

Texas State University (I-9/E-Verify)
(All Groups)
(All Worksites)

- Dashboard
- Search
- Employees**
- Launch Kiosk
- Employee Portal
- Agent Portal
- Administration
- Reporting
- Support Center
- System Notices

DETAILS TASK HISTORY DOCUMENTS CHANGE PASSWORD I-9 / E-Verify

Search... Export

WBS	Task	Priority	Status	Party Responsible	Assigned On	Due Date	Action(s)
E9	Electronic I-9	High	Pending Other Task Completion	Employer		02/06/2024	⚙️
	Section 2 - Form I-9	Medium	Complete	Employer		02/06/2024	⚙️
	Section 1 - Form I-9	Medium	Complete	Employee	01/26/2024	02/05/2024	⚙️
	Supplement B (aka Section 3)	Medium	In Progress	Employer			⚙️
	E-Verify	High	Complete	Employer			⚙️

1 - 5 of 5 items

25 items per page

Revise Task
Revise With Note
Create Emp Docs Task

INTERNATIONAL EMPLOYEE I-9 PROCESS

- E-Verify cannot be processed without a Social Security Number.
- During this waiting period, employees are eligible to start working.
- Once the Social Security Card is received, Section 1 needs to be sent back to the employee.
- Process E-Verify Case
- Notify the employee that they **MUST** submit the Social Security card via the Personal Data Form on the HR Forms webpage.

E-VERIFY REPOSSES

- E-Verify compares I-9 information with federal records (SSA & DHS)
- If information matches → Employment Authorized
- If information does not match → TNC (Tentative Nonconfirmation)
- Employees must be given time to take action and resolve

E-Verify Case Processing

E-Verify Case Processing

E-Verify Case: 2021152160058ML

Employee: Elaine Goodell

Case Status: Tentative Nonconfirmation - Action Required

STEP 1

Download, print and review the Further Action Notice with the employee. The employee can login to the employee portal and view, sign, and take action on the notice. Make sure the employee fully understands the Further Action Notice. The document will explain why the employee received this result, and what they need to do next.

If you encounter any issues downloading the Further Action Notice, please ensure that you are using the latest version of your browser, and that your pop-up blocker is disabled.

[Download FAN Notice](#)

[Close Case](#) [Exit](#)

REHIRES VIA HIRERIGHT

Supplemental B Reverification

- Required for work authorization updates
- Required when a recently separated employee is rehired
- May also be used for name changes
- Use Section 3 in HireRight

The screenshot displays a software interface with a task list. The interface includes tabs for DETAILS, TASK HISTORY, DOCUMENTS, CHANGE PASSWORD, and I-9 / E-Verify. The TASK HISTORY tab is active, showing a table with columns: WBS, Task, Priority, Status, Party Responsible, Assigned On, Due Date, and Action(s). The table contains five rows of tasks. The 'Section 3' task is selected, and its action menu is open, showing options: Choose, Complete, Assign to User, Assign to Me, Assign Outside Agent, Cancel Task, Have Employee Find Agent, and Refresh Status.

WBS	Task	Priority	Status	Party Responsible	Assigned On	Due Date	Action(s)
	E-Verify	High	New	Employer			Choose
E9	Electronic I-9	High	Pending Other Task Completion	Employer			Choose
	Section 2 - Form I-9	Medium	Complete	Employer			Choose
	Section 1 - Form I-9	Medium	Complete	Employee	02/08/2021		Choose
	Section 3	Medium	New	Employer			Choose

CONTACT HR INFORMATION SYSTEMS

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CINDY KEILERS

PERFORMANCE REVIEW LAUNCH

EMPLOYEE RELATIONS

WHY ARE PERFORMANCE DISCUSSIONS IMPORTANT?

Opportunity for employee and supervisor to

- Celebrate achievements;
- Discuss professional development;
- Assess the status of goals;
- Understand strengths and opportunities as we move into the next year.

Employees and Supervisors are strongly encouraged to have regular check-ins throughout the year- but the annual evaluation is an important, structured opportunity for conversation, coaching, and assessment.



EMPLOYEE ASSESSMENT

THE REVIEW STEPS WILL BEGIN WITH THE EMPLOYEE'S SELF-ASSESSMENT.

- Employee rates each goal/job duty
- Honest assessment of goals/duties to performance expectations.

TXST CORE EXPECTATIONS

- Ownership and Accountability
- Time Management
- Collaboration and Teamwork
- Communication

SEND TO MANAGER ASSESSMENT



MANAGER ASSESSMENT

MANAGER COMPLETES EACH REQUIRED SECTION OF THE EVALUATION FORM:

- Ratings and feedback (as appropriate) for each listed goal/job duty
- Manager's Performance Expectations

TXST CORE EXPECTATIONS

- Ownership and Accountability
- Time Management
- Collaboration and Teamwork
- Communication

MEETS COMPLIANCE STANDARDS (ANSWER "NO" IF EMPLOYEE DOES NOT COMPLETE THE MANDATORY TRAINING)

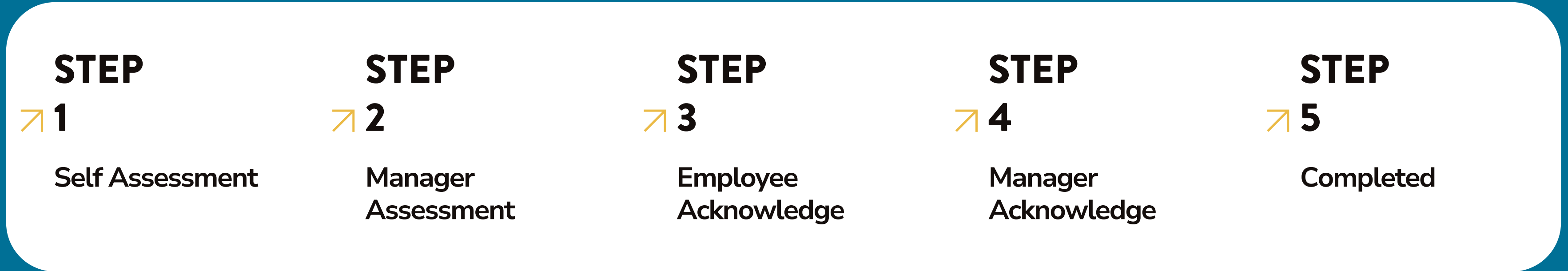
IMPROVEMENTS & GROWTHS

EMPLOYEE MERIT ELIGIBILITY (ANSWER "NO" IF THE COMPLIANCE STANDARDS WERE NOT MET)

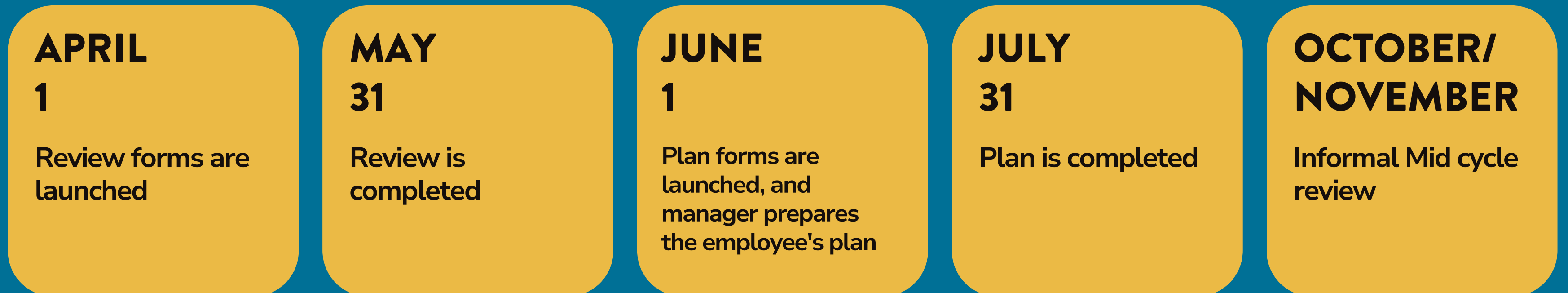
END STEPS

- The manager will send the evaluation to the employee for acknowledgment.
- The Employee will acknowledge and route the evaluation form back to the manager
- The manager will send the evaluation to completed status

TIMELINE



DATES TO REMEMBER





CONTACT EMPLOYEE RELATIONS

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HOLLY HIRSCH

UPDATES FROM PRESIDENTIAL EVENTS

PRESIDENTIAL EVENTS AND PROJECTS



PRESIDENT'S STAFF AWARDS & STATES UP STAFF CARNIVAL

Monday, May 18

3 p.m. to 5 p.m.

Strahan Arena at the UEC

All staff members are invited to attend

The first-ever **STATES UP STAFF CARNIVAL** will begin at Sewell Park following the Staff Awards



SAVE THE DATE



TEXAS STATE
UNIVERSITY.

STATES UP STAFF CARNIVAL





BOBCAT EVENT RESOURCE GROUP (BERG)

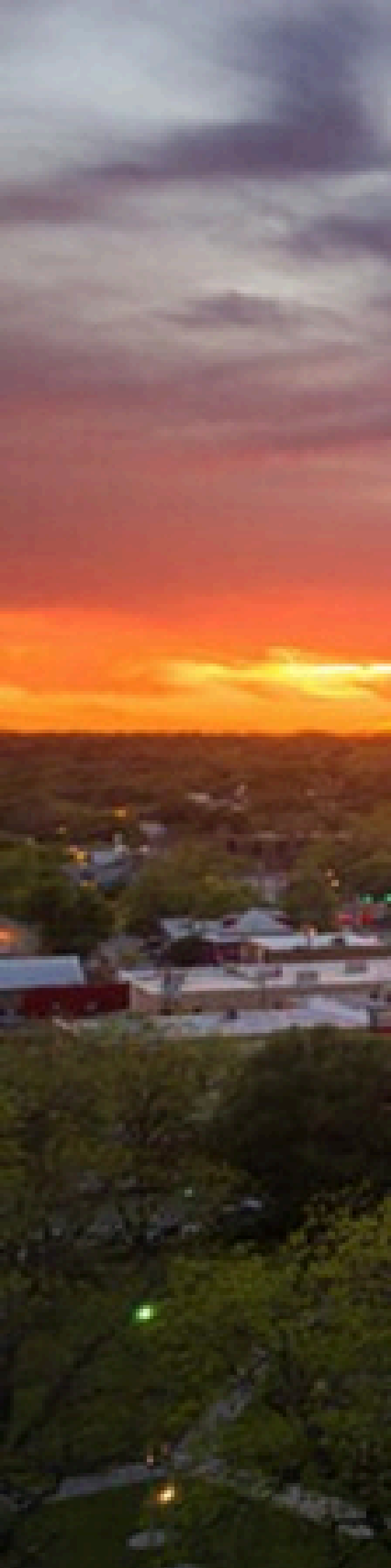
Join Bobcat Event Resource Group (BERG) on Teams

BERG is a collaborative community for Texas State employees who work with events in any capacity—staff, faculty, graduate assistants, planners, and non-planners alike.

BERG was purposefully designed to be a collaboratively built, community-led space where colleagues can share insights, navigate resources together, and strengthen connections across the university.

Our goal is simple: to support one another, share expertise, and make event planning across the university more efficient, connected, and enjoyable.





CONTACT PRESIDENTIAL EVENTS

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CYNTHIA LANDEROS

FY27 BUDGET DEVELOPMENT

OFFICE OF BUDGETING & FINANCIAL ANALYSIS

FY2027 ANNUAL BUDGET DEVELOPMENT CHANGES

- Only identified income-generating fund and auxiliary fee fund managers will have access to and responsibility for making updates in the budget development system. Informational emails have been sent outlining revenue projections and other applicable budget line items.
- All other account managers will have **view-only** access to budget reports and should work directly with the budget office staff if changes or updates are needed.
- Upon receipt, ALL fund managers are to **please review the information and respond in accordance with the new process.**

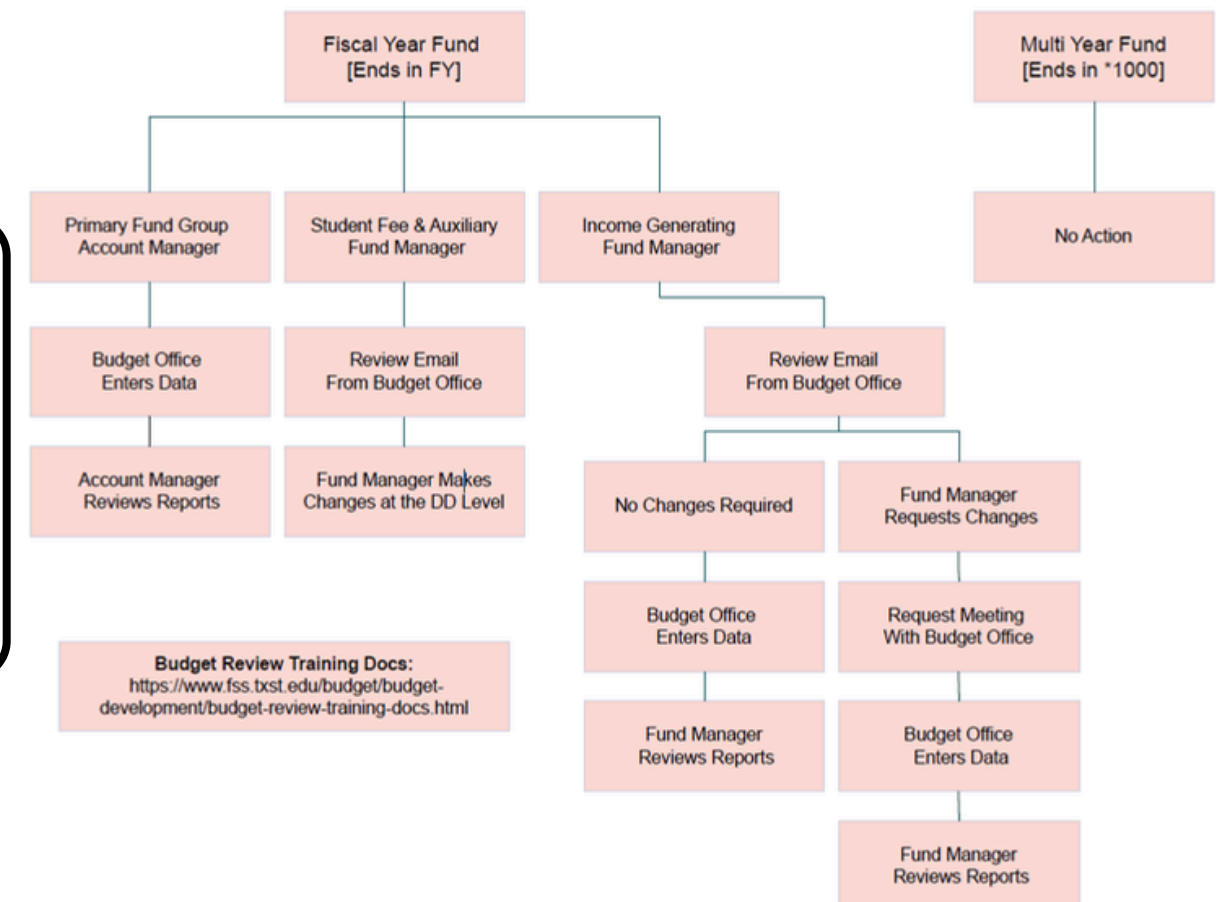
Fund Manager makes changes

Fund	Name
20000210FY	Sponsored Programs
20200210FY	McCoy Graduate Fee
20273810FY	Orientation
20273910FY	Orientation UGADM
20292010FY	AOP Online Programs
20292110FY	Online Programs (OL)
20292210FY	Global Campus Prgms
20292310FY	Partner Programs
20292410FY	International Prog
20292510FY	Global IG
30000010FY	Stud Svc Fee
30010010FY	Medical Service Fee
30020010FY	Student Bus Fee
30030010FY	Student Center
30040010FY	Campus Rec Fee
30050010FY	Athletics
30080010FY	Univ Dining Serv
30090010FY	Parking Services
30100010FY	Residential Housing
30110010FY	ID Services
30201910FY	Campus Rec Revenue
30202110FY	Stud Ctr Food Svc
30202310FY	Student Center Event
30202510FY	Stud Ctr Retail

Fund/Account Manager - View Only/Budget Office makes changes

Fund	Name
PFG	
ALL OTHER INCOME GENERATING	

Account Manager Work Flow for Budget Development





FY2027 ANNUAL BUDGET DEVELOPMENT CYCLE

Any known departmental reorganizations must be communicated to the Budget Office as soon as possible for budget development planning.

KEY DATES

Activity	Date
Deans, Directors and Department Heads Review Budget Changes	April 1 – May 1
Vice Presidents Review Budget Changes	April 1 – May 8
President's Cabinet Review Changes	May 11 – June 1
Office of Budgeting & Financial Analysis Budget Preparation	May 11 – June 22
Finalize Budget Reports	June 22 – July 3
President Budget Review and Submission to Board of Regents	July 3 – July 8
Board of Regents Approved Final Budget	Aug 6 – Aug 7
FY27 Budget Extraction to SAP	July 25 – Aug 10

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MADELINE DAVILA

REVIEWING YOUR W-4

PAYROLL AND TAX COMPLIANCE

WHY REVIEW YOUR W-4 ?

- Your **W-4** controls how much federal tax is withheld from each paycheck
- It impacts **refunds vs. amounts owed**, not total tax liability
- Life changes and income changes **can affect withholding**
- A quick annual review **helps avoid surprises** next tax season

BEST TIMES TO UPDATE YOUR W-4

Review after:

- Tax Season
- Major Life Events
- Employment Changes Impact
- Annual Review Best Practice

HOW TO TAKE ACTION

Use the IRS Tax Withholding Estimator on IRS.gov
<https://apps.irs.gov/app/tax-withholding-estimator>



Tax Withholding Estimator

About you

Income &
tax
payments

Adjustments

Deduction
choice

Additional
deductions

Credits

Results

1 of 7 About you

HOW TO TAKE ACTION

Update your W-4 anytime in the SAP Portal

The screenshot shows the SAP Portal interface. The top navigation bar includes 'SAP Home' and various menu items: 'Welcome', 'General Business Apps', 'Time', 'Payroll-Benefits' (highlighted), 'Travel', 'Approvals', 'ESS +', 'Self-Report', 'W-2s', and 'Help and'. Below the navigation, the 'Payroll-Benefits' section contains five tiles: 'My Personal Profile', 'My W-4' (selected), 'My Paystubs', 'Total Compensation and Benefits Statement', and 'My Benefits'. The 'My W-4' tile is highlighted with a blue bar at the bottom.

Below the tiles, there is a sub-header 'W-4' with a search icon and a user profile icon. Underneath, there is a section titled 'Selection and Overview' with a table of W-4 entries.

Delete	Tax Authority	Filing Status	Valid From	Valid To
<input type="radio"/>	Federal	Single	02/26/2026	12/31/9999

W-4 Information

Total Credits for Dependents: USD Additional Amount, If Any, You Want Withheld from Each Paycheck: USD
 Other Income: USD Use Higher Withholding Rates Schedule:
 Additional Deductions: USD

Filing Status:
 * If married,

W-4	SAP
Step 1(c) <ul style="list-style-type: none"> Single or Married filing separately Married filing jointly or Qualifying Surviving spouse Head of Household 	Filing Status: Select from the drop-down menu.
Step 2 If box is check on W-4...	...then check the box in SAP "Use Higher Withholding Rates Schedule"
Step 3 Claim Dependents and Other Credits	Total Credits For Dependents (dollar amount)
Step 4 (a) Other Income	Other Income (dollar amount)
Step 4 (b) Deductions	Additional Deductions (dollar amount)
Step 4 (c) Extra Withholding	Additional Amount, If Any, You Want Withheld from Each Paycheck (dollar amount)

Form W-4

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

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.

OMB No. 1545-0074

2026

Step 1: Enter Personal Information

(a) First name and middle initial	Last name	(b) Social security number
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 .
City or town, state, and ZIP code		

(c) Single or Married filing separately
 Married filing jointly or Qualifying surviving spouse
 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.)

Caution: To claim certain credits or deductions on your tax return, you (and/or your spouse if married filing jointly) are required to have a social security number valid for employment. See page 2 for more information.

Step 2: Multiple Jobs or Spouse Works

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. Do **only one** of the following.

(a) Use the estimator at www.irs.gov/W4App for the most accurate withholding for this step (and Steps 3-4). If you or your spouse have self-employment income, use this option; **or**

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; **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 generally more accurate than Step 2(b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, Step 2(b) is more accurate

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.)

Step 3: Claim Dependent and Other Credits

If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):

(a) Multiply the number of qualifying children under age 17 by \$2,200	3(a)	\$	
(b) Multiply the number of other dependents by \$500	3(b)	\$	
Add the amounts from Steps 3(a) and 3(b), plus the amount for other credits. Enter the total here	3	\$	

Step 4: 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)** \$

(b) Deductions. Use the Deductions Worksheet on page 4 to determine the amount of deductions you may claim, which will reduce your withholding. (If you skip this line, your withholding will be based on the standard deduction.) Enter the result here . . . **4(b)** \$

(c) Extra withholding. Enter any additional tax you want withheld each pay period . . **4(c)** \$



SPRINTAX CALCULUS TAX DETERMINATION SYSTEM

RESIDENCY (FOR TAX PURPOSES)

W-4 (NONRESIDENT)

TAX TREATY ELIGIBILITY - FORMS (W-8BEN)

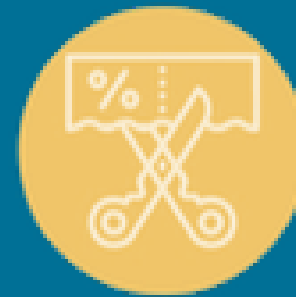
FICA EXEMPTION ELIGIBILITY



USER SET UP ON
SYSTEM



FILL IN ONLINE
QUESTIONNAIRE



TDS CHECKS
RESIDENCY AND
TREATY ELIGIBILITY



TDS PREPARES THE
NECESSARY IRS
FORMS (W-4, W-8BEN,
8233 ETC)



EASY ACCESS TO
GENERATED FORMS

TAXSPECIALIST@TXSTATE.EDU



calculus

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BRIAN GARCIA AND JOSHUA EDWARDS

UFCU





IT ALL STARTS WITH **U**



THE CREDIT UNION DIFFERENCE

- Each Member is an owner
- Local
- Not-for-profit
- For service
- People helping people
- Fewer and lower fees
- Help build credit



UFCU ON CAMPUS

FINANCIAL PROGRAMS

Workshops

- Money Management, Credit Building, Home Buying, and Retirement Planning

One-on-One Consultations

- In-person or Virtual Appointments

Ongoing Learning Resources

- UFCU Credit Coach, and Educational Resources

BANKING SERVICES

Personal Accounts

- Fee-Free Personalized Memberships

Lending Solutions

- Auto Loans
- Personal Loans
- Credit Cards
- Mortgage Loans

Savings & Investments

- Savings & Money Market Accounts
- Certificate Deposits (CDs)
- IRAs & Retirement Options

BENEFITS & FEATURES

Convenient On-Campus Access

- Branch Located on Campus
- Instant-Issue Bobcat Debit Card available in branch

Extensive ATM Access

- 9 On-Campus ATMs

Easy Digital Banking

- Zelle, Apple Pay, Venmo, Cash App, PayPal & more

Direct Deposit

- Get Paid Up to 2-Days Early
- Step-by-Step Payroll Setup Guidance



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SCHEDULE AN APPOINTMENT





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WEBSITE



BRETT LAST

EMPLOYEE CHILDCARE NEEDS SURVEY

HUMAN RESOURCES



EMPLOYEE CHILDCARE NEEDS SURVEY

MARCH 2024

Childcare study by third party consultants SM and RR. Below issues primarily impact SM. Greater availability and flexibility in RR.

- Scarcity
- Convenience e.g. hours
- Affiliation limitations
- Infant care limitations
- Accreditation variations state versus national

LATE 2024

- Decision made to partner with “Core 4” as a community-driven initiative (TXST, Hays County, City of SM, SM ISD).

2025

- Various meetings with Core 4 to gather buy in, agree upon direction, and develop survey appropriate for broad employee audience across various entities.

2026

- Survey approved. Rollout targeted for May 2026 via “Polco” survey program. Will be sent via email with link to survey questions.
- Focus will be on need, availability, affordability, and quality.
- After results are available and reviewed Core 4 will discuss best overall options for the community at large.



THANK YOU!

We hope to see you
at our next
HR Connections
event in July!

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HUMAN RESOURCES

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