Email Form		Reset Form

Request for Temporary Records ID
Trainee/Employee Determination Checklist
(Revised April 2022)

This checklist assists in determining the nature of the payment to a non-U.S. citizen or permanent resident and is required for all temporary identification number requests. Payment classification is required by Payroll Services prior to the UAB Office of International Student & Scholar Services (ISSS) assisting the non-U.S. citizen or permanent resident in applying for either an ITIN (Individual Taxpayer Identification Number) or a SSN (Social Security number).

Individual Information

Name: _____ Date of Birth: _____ Blazer ID: _____

Foreign address: _____
(Required for year-end documents)

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

Is the individual 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 tasks 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.

Temporary ID number assigned by Payroll Services: _____

Please fax (205-975-7417) or email (tax@uab.edu) this **completed checklist** along with a **copy of the individual's hire/invitation/ award letter, passport biographical page,** and work **authorization document (e.g., Form I-20 for F-1 students, Form DS-2019 for J-1 exchange visitors, USCIS Form I-797 for H-1B/O-1/E-3 employees, or EAD card for others).**

If you have questions about the appropriate work authorization document to attach, please email: isss@uab.edu and/or review the information Immigration HR - Office of Global Engagement | UAB.