

Employee Checklist for Changing Your Name

Below is a list of tasks that employees should complete to ensure that their name has been changed in all of the appropriate areas.

Employees' MUST apply for and receive a new social security card with their new name prior to starting this process.

Required Forms:

- Name Change Form
- W4 Federal Tax Withholding Form
- M4 State Tax Withholding Form
- Direct Deposit Form

If you have the following benefits you should also notify the vendor of your name change:

- Crosby Benefits
- TIAA-CREF
- Fidelity Investments
- American Century
- Pax World

The Office of Human Resources will notify the following vendors and/or Smith departments of your name change:

- Delta Dental and Harvard Pilgrim (benefits)
- Payroll Office (paycheck)
- Information Technology Services (username, systems access, email account)
- Campus Operations (procurement cards)
- HR Information Systems (WTE access)



NAME CHANGE FORM

Employee Old Name: _____

Employee New Name: _____

Employee Smith ID #: _____

Effective Date of Change: _____

Employee Signature: _____ Date: _____

NO CHANGE TO CURRENT MAILING ADDRESS

OR

CHANGE MAILING ADDRESS TO:

Street Address: _____

Apt# or P.O. Box: _____

City: _____

State: _____ Zip Code: _____

Phone: _____