*This checklist is designed to assist* ***supervisors*** *and* ***Human Resource Representatives*** *as they orient new employees to the University of North Carolina at Chapel Hill. It serves as a tool for communicating relevant University and department-specific policies, administrative procedures, position responsibilities and expectations and other essential information. A copy of this document should be maintained in the employee’s personnel file.*

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| --- | --- |
| Employee’s Name: |       |
| PID Number: |       |
| Department Name: |       |
| Title: |       |
| Supervisor: |       |
| Hire Date: |       |
| **Background Check Completed:** | [ ]   |

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| **Check ☑ When Each Task is Completed**  |
| **Human Resources Representative** |
| [ ]  Confirm acceptance of offer, start date and work schedule |
| [ ]  Employee will attend the “Welcome to Carolina Blue – Your Journey Starts Here” New Employee Orientation *(See Note 1 below)* |
| [ ]  Send welcome email to new employee |
| [ ]  Confirm receipt of Conditions of Employment  |
| [ ]  Confirm receipt of signed Appointment/Contract Letter (if applicable) |
| [ ]  Confirm the employee knows where they are supposed to report to after new employee orientation |
| [ ]  Notify the hiring unit that a new person is starting and what that person’s job will be |
| [ ]  Order business cards and name plate |
| [ ]  Set-up employee’s mailbox |
| [ ]  Order supplies/assign equipment  |
| [ ]  Update campus directory (Confirm employee’s name, title and campus address) |
| [ ]  Update department phone list |
| [ ]  Introduce new employee to other staff members |
| [ ]  Introduce new employee to peers/colleagues (if appropriate) |
| [ ]  Take employee on department, building and campus tour  |
| [ ]  Review emergency procedures and emergency contacts |
| [ ]  Provide link to the Campus Map and Disability Access |
| [ ]  Submit a parking permit request to Department of Public Safety/Transportation & Parking |
| [ ]  Request and provide Onyen |
| [ ]  Complete and submit any applicable systems access request forms |
| [ ]  Review position description & performance expectations |
| [ ]  Review department’s organizational chart and explain its relationship to campus |
| [ ]  Review office/department policies & procedures  |
| [ ]  Review Time Information Management System (TIM) time reporting. Provide the employee with a link to the  TIM user guides: : <https://finance.unc.edu/services/training/> |
| [ ]  If the employee is a non-resident alien, ensure that s/he reports to International Student and Scholar Services *(See*  *Note 2 below)* |
| [ ]  Notify the employee at the time of hire that they must obtain degree equivalency from an accredited credential evaluation service if their highest post-secondary degree was obtained from an international institution of higher education. For more information, refer to the [background check procedure](https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=131721). |
| **EHRA Non-Faculty/Faculty HR Representative** |
| [ ]  Form I-9 (Employment Eligibility Verification) is completed and supporting documents presented by the employee within three (3) days of their hire date.  |
| [ ]  Direct employee to complete online Tax Forms (W-4 and NC-4). Tax forms may be accessed via the ConnectCarolina portal’s Self Service tab. |
| [ ]  Direct deposit forms may be accessed via the ConnectCarolina portal’s Self Service tab. |
| [ ]  Notify the employee at the time of hire that they must obtain foreign degree equivalency from an accredited credential evaluation service if their highest post-secondary degree was conferred by an international institution of higher education. For more information, refer to the [background check procedure](https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=131721). |
| **Supervisor** |
| [ ]  Form I-9 (Employment Eligibility Verification & Supporting Documents) is completed during the first 3 days of their hire date. |
|  [ ]  Direct employee to complete online Tax Forms (W-4 and NC-4)– Tax forms may be accessed via the ConnectCarolina Self Service tab |
| [ ]  Direct deposit forms may be accessed via the ConnectCarolina Self Service tab |
| [ ]  Within 30 days, meet with employee to review job description, workplace, performance standards and work rules.  |
| [ ]  Within 90 calendar days:* Ensure that the employee has obtained a degree equivalency from an accredited credential evaluation service if their highest post-secondary degree was conferred by an international institution of higher education. For more information, refer to the [background check procedure](https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=131721).
* Revisit performance standards and provide SHRA Employee Management & Competency Assessment and Performance Review. Discuss both documents with employee.
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| **Training** |
| [ ]  HIPAA Training (if applicable) <https://ehs.unc.edu/training/self-study/hipaa/> |
| [ ]  Environmental Health & Safety Training within 30 days of employment <http://ehs.unc.edu/training/>  |
| [ ]  Equal Opportunity/ADA Office Training – Preventing Employment Discrimination & Preventing Sexual Harassment Online @ <https://eoc.unc.edu/what-we-do/trainings-programs-awareness/> |
| [ ]  Research Training (*See Note 3 Below*) |
| **Security** |
| [ ]  UNC One Card – Ensure employee picks up their One Card at Student Stores |
| [ ]  ID Badge and/or Bldg. Access Card/Information/Keys |
| [ ]  Review office safety issues |
| [ ]  Alert Carolina – Receive information about registering employee contact information at  <https://alertcarolina.unc.edu/> |
| [ ]  Set up email for the employee |
| [ ]  Purchasing Card (if applicable) |
| [ ]  Travel and reimbursement policy and process (if applicable) |
| [ ]  Travel credit card (if applicable)  |
| [ ]  Systems/Computer/User access forms and approvals (Show employee what access they have and how to use it) |
| [ ]  Discuss University’s personal use policy: <https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=131363>  |
| [ ]  Discuss University’s policy on the Privacy of Electronic Information:<https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=132145> |
| [ ]  Review the Basic Security Checklist for steps to protect computers and personal information:  <https://safecomputing.unc.edu/> |
| [ ]  Listserv(s); File servers |
| [ ]  Overview of policies and procedures, including confidentiality and privacy issues |
| [ ]  Provide information on the department/university’s records retention and disposition schedule |
| **Recommended Actions** |
| [ ]  Arrange for the new employee to shadow yourself or another employee the first couple of days |
| [ ]  Arrange introduction to other employees during the first week |
| **Campus Contacts** |
| Benefits Services | 919-962-3071 | <https://hr.unc.edu/benefits> |
| Campus Security  | 919-962-3951 | <https://police.unc.edu/> |
| Payroll Services | 919-962-0213 | <https://finance.unc.edu/departments/payroll/> |
| Environment, Health & Safety | 919-962-5507 | <https://ehs.unc.edu/> |
| EHRA Non-Faculty | 919-962-2897 | <http://go.unc.edu/ehra-nf-policies> |
| ITS Response Center | 919-962-4357 | <https://help.unc.edu/> |
| Payroll | 919-962-0046 | <https://go.unc.edu/payroll> |
| UNC One Card | 919-962-8024 | <https://onecard.unc.edu/> |
| New Employee Website | 919-962-1630 | <https://new.unc.edu> |

***Note(s):***

*1)* “Welcome to Carolina Blue – Your Journey Starts Here,” is a zoom-based orientation that provides an overview of the programs, services, policies and benefits offered by the University.

* **All Exempt from the State Human Resources Act (EHRA) Non-Faculty employees must attend Welcome to Carolina Blue session on their first day of employment.** Employees are enrolled in a session by the EHRA Non-Faculty unit after the HR Representative confirms a start date. When the orientation session is scheduled, new employees should confirm the date, time and location of the session and what document(s) they need to bring.
* **All Subject to the State Human Resources Act (SHRA) employees must attend a Welcome to Carolina Blue session on their first day of employment.** When the orientation session is scheduled, new employees should confirm the date, time and location of the session and what document(s) they need to bring.

*2)* If the employee possesses or requires a work authorization document, arrange for the employee to report to International Student and Scholar Services (ISSS) in advance of starting work to verify work eligibility: ISSS is located in the FedEx Global Education Center, 301 Pittsboro Street, Room 2004, Telephone: 919-962-5661; Email: oisss@unc.edu
*3)* Direct the employee to the University’s research web site <http://research.unc.edu/offices/human-research-ethics/getting-started/training/> or have them contact the Office of Human Research Ethics (IRB) at 919-962-1344 or the university’s Research Compliance Office at 919-962-0338 for information on training requirements for research involving human subjects.