



This checklist is designed to assist **managers** 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. This document can also be merged with any department-specific onboarding checklists. A copy of this document should be maintained in the employee's personnel file.

Employee's Name: _____
Department Name: _____
Title: _____
Supervisor: _____

PID Number: _____
Department #: _____
Position #: _____
Hire Date: _____

BACKGROUND CHECK COMPLETE:

BEFORE FIRST DAY (Check when completed)

- Confirm acceptance of offer, start date and work schedule
- Schedule the "Welcome to Carolina" orientation (*See Note 1 below*)
- Send welcome email to new employee with clear instructions on expectations post-orientation
- Confirm receipt of AP-2/Recommendation for EHRA Personnel Action (if applicable)
- Confirm receipt of Conditions of Employment or AP-2a Appointee Certification and Conditions of Employment
- Confirm receipt of signed Appointment/Contract Letter (if applicable)
- Confirm receipt of Equal Opportunity Employment Data Forms
- Notify the hiring unit that a new person is starting and what that person's job will be
- Ensure that foreign credentials verification is complete (OHR only conducts U.S. degree verifications)
- Ensure computer and phone to be set up, assign equipment and order any needed supplies
- Order business cards and name plate
- Set up employee's mailbox
- Submit a parking permit request to Transportation and Parking
- Request and provide Personal Identification Number (EMPL ID)
- Request and provide Onyen (**MUST BE COMPLETE BY FIRST DAY**)

DAY BEFORE

- Confirm office set up
- Confirm "Day 1 Buddy"

FIRST DAY

- Confirm Form I-9 (Employment Eligibility Verification and Supporting Documents), Tax Forms (W-4 and NC-4) and Direct Deposit Forms are completed at New Employee Orientation Session
- Update campus and department directory (Confirm that employee's name, title and campus address)
- Introduce new employee to other staff members
- Take employee on department, building and campus tour
- Review emergency procedures and emergency contacts
- Provide link to/copy of Campus Map and Disability Access
- Complete and submit any applicable systems access request forms
- Review position description and performance expectations
- Review department's organizational chart and explain its relationship to campus
- Review office/department policies and procedures
- Review training for upcoming week
- Take to get OneCard (*see Note 2 below*)
- Show where HR Online Toolkit is and allow time to review
- Review Time Information Management System (TIM) time reporting. Provide the employee with a link to the TIM user guides : <http://finance.unc.edu/university-controller/time-information-management/tim/welcome.html>
- Ensure service permit and gate pass for training at Manning**



WITHIN TWO WEEKS

- Arrange for lunch/coffee for Monday after HR training
- Introduce new employee to peers/colleagues

TRAINING:

- HIPAA Training (if applicable) <http://www.med.unc.edu/security/hipaa-train>
- Environmental Health and Safety Training within 30 days of employment <http://ehs.unc.edu/training/>
- Equal Opportunity/ADA Office Training – Preventing Employment Discrimination and Preventing Sexual Harassment Online - <http://equalopportunity-ada.unc.edu/equal-opportunity-training/index.htm>
- Research Training (See Note 3 Below)

SECURITY:

- Review office safety issues
- Alert Carolina – Registering employee contact information <http://www.alertcarolina.unc.edu/go/site/1395/>
- Copier Card/Code (if applicable) and copy machine and fax use
- Purchasing Card (if applicable)
- Travel and reimbursement policy and process
- Travel credit card (if applicable)
- Systems/Computer/User access forms and approvals
- Discuss University's personal use policy: http://www.unc.edu/chan/policies/personal_use.html
- Discuss University's policy on the Privacy of Electronic Information: http://www.unc.edu/campus/policies/elec_info.html
- Review the Basic Security Checklist for steps to protect computers and personal information: <http://its.unc.edu/InfoSecurity/basicsecuritychecklist/index.htm>
- 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

Note(s):

1) "Welcome to Carolina" is a classroom-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 a Welcome to Carolina session within 30 days of hire.** Registration is available at <http://www.surveymonkey.com/s/EPANEO>.
- **All Subject to the State Human Resources Act (SHRA) employees must attend a Welcome to Carolina 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) All persons applying for a UNC One Card must go to the UNC One Card Office in person and present proper identification (Driver's License, State ID, Military ID, or Passport) and have been issued a PIDnumber for card issuance. The UNC One Card Office is located on the lower level of Daniels Student Stores.

3) Direct the employee to the University's research website <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.