*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. 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 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 - copy of Campus Map and Disability Access |
| 🖵 Submit a parking permit request to Department of Public Safety/Transportation & Parking |
| 🖵 Request and provide Personal Identification Number (EMPL ID) |
| 🖵 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)* |
| **For EHRA Non-Faculty HR Representatives** |
| 🖵 Form I-9 (Employment Eligibility Verification & Supporting Documents) is completed during the first 3 days of their hire date. |
| 🖵 Direct employee to online Tax Forms (W-4 and NC-4)– Tax forms may be accessed via the ConnectCarolina portal’s SelfService tab. |
| 🖵 Direct Deposit Forms may be accessed via the ConnectCarolina portal’s SelfService tab. |

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| **For SHRA Supervisors** | | |
| 🖵 Form I-9 (Employment Eligibility Verification & Supporting Documents) is completed during the first 3 days of their hire date. | | |
| 🖵 Direct employee to online Tax Forms (W-4 and NC-4)– Tax forms may be accessed via the ConnectCarolina SelfService tab | | |
| 🖵 Direct Deposit Forms may be accessed via the ConnectCarolina SelfService tab | | |
| 🖵 Within 30 days, meet with employee to review job description, workplace, performance standards and work rules. | | |
| 🖵 Within 90 days, revisit performance standards and provide SHRA Employee Management & Competency  Assessment and Performance Review. Discuss both documents with employee. | | |
| **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 – Allow employee to pick up their One Card at the Student Store | | |
| 🖵 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> |
| **Other** | | |
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***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](mailto: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.