**Postdoc Onboarding/Reappointment Checklist**

Action Steps to Complete Prior to Postdoc Start Date

* Submit posting/waiver in PeopleAdmin – candidate MUST apply (or departmental HR Representative must apply on their behalf)
* Be sure and help manage any visa paperwork (if applicable) and put international postdoc in contact with ISSS as soon as possible
* Complete criminal background check
* Once background check is complete/references have been checked, complete selection and hiring proposal in PeopleAdmin
* Start I-9 and ensure postdoc completes Section I on or before his/her start date
* Email postdoc paperwork to sign/submit/review:
  + Offer letter with salary, start date, terms of appointment, etc. (see template at OPA website)
  + NC-4
  + W-4
  + Direct Deposit Form
  + AP-2s
  + Health Insurance Information Packet from Hill Chesson and Woody
  + Postdoctoral Policies
* Register postdoc for new postdoc orientation

Forms to upload to EPAWeb with New Hire Action

* Signed appointment letter
* AP-2s
* Current CV
* Copy of last page of background check (with file number/return date)
* Any necessary information on degree conferral (i.e. letter stating employee has fulfilled all degree requirements if he/she has not yet had PhD conferred, may be uploaded at later date if information is not available at time postdoc starts)

Actions Steps to Complete on Postdoc’s First Day(s)

* Complete Part II of I-9
* Collect forms to submit to payroll (if not done in advance)
* Go over departmental/school policies (how to track leave, work schedules, emergency procedures, department specific trainings, etc.)
* Ensure postdoc is given tour of building/introductions to critical staff
* Provide information to postdoc on Individual Development Plan (IDP)
* Assist postdoc in obtaining his/her UNC OneCard
* Assist postdoc in creating their onyen
* Ensure postdoc has access to computer and necessary network drives, files, programs, etc. needed for their position
* Ensure postdoc has proper access to building, labs, keys, swipe card access, etc.
* Ensure benefits paperwork is submitted to Hill, Chesson, and Woody within first 30 days of hire

Action Steps to Complete Prior to Reappointment

* Ensure annual evaluation has been conducted by the faculty mentor
* Draft reappointment letter with new terms of employment, changes to salary (if applicable), new appointment end date, etc. and receive signatures
* Submit reappointment action in EPAWeb (and upload signed reappointment letter)
* Work with OPA/EPA Non-Faculty HR to complete any salary increase paperwork/approvals if increase is being granted at time of reappointment – include salary approval email from EPA NF as uploaded document in EPAWeb salary action (if necessary – process dependent on current budget restrictions/procedures in place)

Quick Links to Applicable New Hire Forms

* **NC-4**:

<http://www.dornc.com/downloads/nc-4.pdf>

* **W-4**:

<http://www.irs.gov/pub/irs-pdf/fw4.pdf>

* **Direct Deposit Form**: <http://financepolicy.unc.edu/ccm/idcplg?IdcService=GET_FILE&dDocName=CCM1_016072&RevisionSelectionMethod=Latest&allowInterrupt=1>
* **AP-2s**:

<http://hr.unc.edu/files/2012/11/ap-2s.doc>

* **Health Insurance Information Packet from Hill, Chesson, and Woody**:

<http://research.unc.edu/files/2013/06/UNC-Postdoc-enrollment-packet-2013-2014.pdf>

* **Postdoc Health Insurance Rates:**

[http://research.unc.edu/files/2013/06/HC-13-14- rates.pdf](http://research.unc.edu/files/2013/06/HC-13-14-%20%20rates.pdf)

* **Postdoc Benefit Summary**:

<http://research.unc.edu/files/2013/06/Summary-of-Benefits.pdf>

* **Postdoctoral Policies**:

<http://research.unc.edu/files/2013/06/Postdoctoral-Scholar-Policy-April-2013-Version-00065688.pdf>

* **Authorization for background check**: <http://hr.unc.edu/files/2013/05/backgroundcheck1.docx>
* **Sample IDP**: <http://research.unc.edu/files/2013/06/PostdocIndividualDevelopmentPlan.pdf>
* **Appointment Letter Template:**

<http://research.unc.edu/files/2013/07/sample-appointment-letter-to-postdoc.doc>

* **Reappointment Letter Template:**

<http://research.unc.edu/files/2013/07/sample-re-appt-letter-to-postdoc.doc>