*This checklist is designed to assist managers and Human Resource Facilitators as they orient new employees to the University of North Carolina at Chapel Hill. It serves a structure 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.*

Employee’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PID Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Department#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hire Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Criminal Background Check (AP2b): 🖵**

**I-9 (Employment Eligibility Verification & Supporting Documents): 🖵**

**Check each as appropriate. ☑ = Task Completed N/A = Not Applicable**

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| --- |
| **Human Resources** |
| 🖵 Confirm acceptance of offer and start date  🖵 Confirm receipt of Conditions of Employment (AP2a) and signed Appointment/Contract Letter  🖵 Ensure that Credentials Verification (OP1 ) is complete  🖵 Schedule the “Welcome to Carolina” orientation *(See Note 1 below)*  🖵 Campus Directory (Confirm that employee’s name, title and campus address)  🖵 Department Phone List (update)  🖵 Department, Building and Campus Tour  🖵 Direct Deposit Forms & Paycheck Access Information. Direct Deposit forms may be accessed from the Payroll Services Web site @http://finance.unc.edu/university-controller/payroll-services/welcome.html  🖵 Emergency procedures and emergency contacts  🖵 Link to/Copy of Campus Map and Disability Access  🖵 Mailbox  🖵 Office/Department Policies & Procedures  🖵 Parking Permit – Submit a parking permit request to Department of Public Safety/Transportation & Parking  🖵 Request and provide Personal Identification Number (PID)  🖵 Request and provide Onyen  🖵 Position Description & Performance Management  🖵 Supplies/Equipment Assignment  🖵 Tax Forms (W-4 and NC-4)  🖵 Time Information Management System (TIM) – Explain time reporting in the TIM system: <http://finance.unc.edu/university-controller/time-information-management-tim/welcome.html>  🖵 Work Authorization *(See Note 2 below)* |
| **Training** |
| 🖵 HIPAA Training (if required) <http://www.med.unc.edu/security/hipaa-train>  🖵 Environmental Health & Safety Training http://ehs.unc.edu/training/  🖵 Equal Opportunity/ADA Office Training – Preventing Employment Discrimination & Preventing Sexual Harassment. Online @ <http://equalopportunity-ada.unc.edu/equal-opportunity-training/index.htm>  🖵 Research Training *(See Note 3 below)* |
| **Security** |
| 🖵 UNC One Card *(See Note 4 below)*  🖵 ID Badge and/or Bldg. Access Card/Information/Keys  🖵 Alert Carolina – Provide information to the employee about registering his/her contact information at <http://www.alertcarolina.unc.edu/go/site/1395/>   * Copier Card/Code (if applicable)   🖵 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> 🖵 Direct employee to the Basic Security Checklist for steps to protect computers and personal information: [http://its.unc.edu/InfoSecurity/basicsecuritychecklist/index.htm](http://its.unc.edu/InfoSecurity/basicsecuritychecklist/index.htm%20)  🖵 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  Accounting/Payroll Services  🖵 Provide employee information on the Payroll Schedule and E-Pay/Direct Deposit Paystub Access  🖵 General review of accounting  🖵 FRS & listing of financial account numbers (if applicable)  🖵 Introduction to UNC Chapel Hill Accounting – Training modules <http://finance.unc.edu/university-controller/accounting-services/welcome.html> |
| **Recommended Actions** |
| 🖵 Arrange for yourself or a work partner to have coffee/lunch with new employee  🖵 Arrange introduction to other employees during the first week  🖵 Review department’s organizational chart and explain its relationship to campus  🖵 Review position duties/responsibilities and expectations |
| **Campus Contacts** |
| |  |  | | --- | --- | | Benefits Services | 919-962-3071 <http://hr.unc.edu/benefits/index.htm> | | Campus Security | 919-962-3951 <http://www.dps.unc.edu/> | | Environmental Health & Safety | 919-962-5507 <http://ehs.unc.edu/> | | EPA Non-Faculty | 919-962-2897 <http://hr.unc.edu/policies-procedures-guidelines/epa-non-faculty-policies> | | ITS Helpdesk | 919-962-4357 <http://help.unc.edu/index.htm> | | Payroll | 919-962-0046 <http://finance.unc.edu/university-controller/payroll-services/welcome.html> | |
| **Other** |
| 🖵 ­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  🖵 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  🖵 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

***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 EPA 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>

*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/services/index.php> 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.

4) All persons applying for a UNC One Card must come 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 PID# for card issuance. The UNC One Card Office is located on the lower level of Daniels Student Stores.