*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#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**Criminal Background Check: 🗌**

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

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

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| **Department/Human Resources** |
| 🖵 Confirm acceptance of offer and start date **☑** Confirm receipt of Conditions of Employment (AP2s) and signed Appointment/Contract Letter **☑** Ensure that Credentials Verification is complete as part of background check**☑** Schedule “New Postdoc 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 (if applicable) or provide Park and Ride options or transportation alternatives🖵 Request and provide Personal Identification Number (PID) 🖵 Request and provide Onyen🖵 Provide IDP information🖵 Supplies/Equipment Assignment**☑** Tax Forms (W-4 and NC-4)🖵 Provide information on how postdocs track/account for leave taken🖵 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)

🖵 Travel and reimbursement policy and 🖵 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🖵 Obtain signed confidentiality statement, if applicable (UNC SOM) |
| **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🖵 Schedule time to meet to go over Postdoc’s IDP |
| **Campus Contacts** |
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| --- | --- |
| Office of Postdoctoral AffairsHill, Chesson, & Woody (Benefits) | 919-962-9982 <http://research.unc.edu/offices/postdoctoral-affairs/>919-967-5900 <https://www.bcbsnc.com/content/studentblue/uncch/index.htm> |
| Campus Security | 919-962-3951 <http://www.dps.unc.edu/> |
| Environmental Health & Safety  | 919-962-5507 <http://ehs.unc.edu/> |
| ISSS | 919-962-5661 <http://iosss.unc.edu> |
| ITS Helpdesk | 919-962-4357 <http://help.unc.edu/index.htm> |
| Payroll | 919-962-0046 <http://finance.unc.edu/controller/payroll-services/> |
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| **Other**  |
| 🖵 ­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_🖵 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_🖵 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

***Note(s):***

*1)* New Postdoc Orientation is a classroom-based orientation that provides an overview of the programs, services, policies and benefits offered by the University to all postdoctoral scholars. **All Postdoctoral Scholars must attend a Welcome to Carolina session within 90 days of hire (preferably within 30 days of hire).** Registration is available at https://apps.research.unc.edu/events/index.cfm?event=events.browseEvents&searchEventCriteria=&Sponsor\_id=9&r=1387829789022

*2)* If the postdoc 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/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.