

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 selection and hiring proposal is submitted in PeopleAdmin, then complete background and reference checks
- 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 (submit in ConnectCarolina under Self-Service tab)
 - W-4 (submit in ConnectCarolina under Self-Service tab)
 - Direct Deposit Form (complete in ConnectCarolina under Self-Service tab)
 - Conditions of Employment – Regular Temporary Form
 - Health Insurance Information Packet from Student Blue (BCBS of NC)
 - Postdoctoral Policies
- Please email Jennifer Pruitt (jennifer_pruitt@unc.edu) to enroll to the New Postdoc Orientation Canvas course.

Forms to upload to ConnectCarolina with New Hire Action

- Signed appointment letter
- Conditions of Employment – Regular Temporary Form
- 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
- Submit all payroll forms through Connect Carolina under the Self-Service tab (Tax Forms and Direct Deposit setup)
- 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 Student Blue (BCBS of NC) 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 ConnectCarolina (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 ConnectCarolina salary action (if necessary – process dependent on current budget restrictions/procedures in place)

Quick Links to Applicable New Hire Forms

- **NC-4, W-4, and Direct Deposit Forms:**
[Connect Carolina](#)
- **Conditions of Employment – Regular Temporary:**
[COE-Temporary-Employee-2-20-24.pdf](#)
- **UNC Postdoc BCBSNC Packet 2024-2025 (medical, dental, vision) is coming soon**
- **Postdoc Health Insurance Rates:**
<https://research.unc.edu/wp-content/uploads/2024/06/Postdoc-Rates-2024-25.pdf>
- **Postdoc Benefit Summary:**
https://research.unc.edu/wp-content/uploads/2024/06/2024_Student_Blue_Post_Doc_Benefit_Highlights.pdf
- **Postdoctoral Policies:**
<https://policies.unc.edu/TDClient/2833/Portal/KB/ArticleDet?ID=132268>
- **Postdoc candidate will sign the authorization for background check electronically through ConnectCarolina in the ePar when requested to do so by the HR Representative**

- **Sample IDP:**
<http://research.unc.edu/files/2013/06/PostdocIndividualDevelopmentPlan.pdf>
- **Appointment Letter Template:**
<https://www.google.com/url?sa=t&source=web&rct=j&opi=89978449&url=https://research.unc.edu/wp-content/uploads/2017/08/Postdoc-offer-letter-template-9-1-2017.docx&ved=2ahUKEwjbjJ-K7-6LAXUfSDABHXbZAZIQFnoECBUQAQ&usg=AOvVaw3Ptf5d6Mled0uRhc2x076d>
- **Reappointment Letter Template:**
<https://research.unc.edu/wp-content/uploads/2013/07/sample-re-appt-letter-to-postdoc.doc>