SUPERVISOR ORIENTATION CHECKLIST
FOR NEW POSTDOCTORAL RESEARCH ASSOCIATES/TRAINEES

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

Department/Human Resources

- ☐ Confirm acceptance of offer and start date
- ☐ Confirm receipt of Conditions of Employment – Regular Temporary form 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 may be setup under the Self-Service tab in ConnectCarolina
- ☐ 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) completed in ConnectCarolina under the Self-Service tab
- ☐ 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/
- ☐ The Equal Opportunity/ADA Office Training – Preventing Employment Discrimination & Preventing Sexual Harassment may be accessed @ Carolina Talent.
- ☐ 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: 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
- ☐ 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

Office of Postdoctoral Affairs	919-962-9982	http://research.unc.edu/offices/postdoctoral-affairs/
Student Blue, BCBS of NC (Benefits)	1-800-762-8505	https://studentblue.bcbsnc.com/uncchpd/login
Campus Security	919-962-3951	https://police.unc.edu/
Environmental Health & Safety	919-962-5507	http://ehs.unc.edu/
ISSS	919-962-5661	https://isss.unc.edu/
ITS Helpdesk	919-962-4357	http://help.unc.edu/index.htm
Payroll	919-962-0046	https://finance.unc.edu/departments/payroll/

Other

- ☐ _____
- ☐ _____
- ☐ _____

Note(s):
1) New Postdoc Orientation is a Canvas course 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).** Please email Jennifer Pruitt (jennifer_pruitt@unc.edu) to enroll.
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: https://isss.unc.edu/
3) Direct the employee to the University's research web site https://research.unc.edu/ 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.