NEW EMPLOYEE HIRING CHECKLIST

The purpose of this form is to provide information on how to proceed when processing new employee hire. You may modify it as you please.

Name: ____________________________________________  Empl ID: __________________________
Department: ______________________________________ Room #: _______  Telephone #: ________________
Effective Date of Appointment: ____________________  Position Number: ____________________
Academic ____________________  Staff ____________________  Temporary________________________
Full Time ___________  Part-time __________  FTE __________
Work Months __________________  Pay Months_______________  Annual Pay Rate __________________
Monthly Rate ______________  Bi-Weekly Rate _____________  Hourly Rate ______________
Account: __________________________________________  Source of Funds: ______________________

NEW EMPLOYEE

_____ Application and Resume
_____ Offer/Acceptance Letter (must be signed by employee)
_____ Have employee complete the following Personal Profile Forms where applicable:
   ___ Personal Profile Form (ED) collects legal name, SSN, DOB, home address, etc. (please give this one priority)
   ___ Personal Profile Form (PS) collects licenses, honors/awards, emergency contacts, etc.
   ___ Personal Profile Form (PSA) identifies employee who wants to be identified as having a disability

Background Check Consent Form Obtained: ______________ (date and/or check mark)
(Support Staff submit electronic consent signature when applying on-line. Temporary and Professional Staff complete the paper form)

Background Checks: (See Background Check Charges activity on the CATS website and GIS Vendor website)
   Fee Amount: ______________________________
   Charge fee to account ______________________________
   Date Completed: ______________________________

I-9 Employment Eligibility Verification & Identification:
   Send I-9 Invitation __________
   Complete Section 2 (Face to Face): __________
   Date Completed: ______________

FOR EPTO

Supervisor’s Name: ____________________________  Supervisor’s Position Number: ______________

TASKS and FORMS (Yes - No – N/A)
_____ Initiate “Maintain Person” to make sure there is no record in the system.
_____ Create “Add New Person” eDoc* in HRMS to obtain University ID Number if new to IU (International routes to Office of International Services for University ID#).
_____ To help new hires obtain a parking permit:
   • Populate the employee’s Campus Location Code (part of the IU Office Address) by selecting from the drop-down list of valid values (BL, CO, EA, FW, IN, KO, NW, SB and SE).
   • Create employment/welcome letter for new employees to obtain their Parking Permit.
INFORMATION TO EMPLOYEE

_____ Inform employee that an email from **IU Payroll** will be received (an automated email sent to the personal email address provided by employee in the Hire forms) which contains instructions with how to create your IU email accounts, where to sign up for direct deposit, and federal tax exemptions.

_____ An email from **HR** will be received as well with health insurance **(30 day deadline)** and benefits information.

_____ Inform employee to contact the **UHRS records specialists** (person who processes E-Docs and benefits paperwork) assigned to the department for benefits questions.

_____ Inform employee where to obtain University picture ID (Campus Card Services).

_____ Timesheet or ePTO record is generated for employee. Clock in/out employees you may need to add their time for the first day if access wasn’t given (IMPORTANT: write a note on the timesheet).

_____ Notify department IT Office and request access to server, computer, equipment etc.

_____ Access to IU Systems can now be requested.

*Recommendation*: When creating an add new person edoc include the non-IU e-mail address on the edoc so that the system gets the e-mail address to send the new employee through the IU Payroll system generated e-mail. If no personal email is provided instruct employee to go to [http://itaccounts.iu.edu](http://itaccounts.iu.edu) provide them with their University ID so she/he can create an IU e-mail.

SYSTEMS ACCESS

_____ **KFS** (Initiate KFS User Document to establish a new TP user) Go to One.IU > **KFS** > **Chart of Accounts** > **System User Role** > **Lookup**

Remember, an **IU User Agreement** must be completed by the new user and forwarded to UITS in addition to completing the KFS User Document. The entire process normally takes two or three working days.

_____ Provide **DUO** Token to employee:

- If the new hire is filling a vacancy the DUO Token should be collected from ex-employee and deactivated (go to [One.IU](https://one.iu.edu) and look-up “DUO token deactivation”), and given to the new hire to be activated.
- Otherwise, DUO tokens can be ordered and paid by a departmental account at [https://iuware.iu.edu/sales/default.aspx](https://iuware.iu.edu/sales/default.aspx). Once the new hire receives the DUO token they should go to “DUO Token Activation” in One.IU to set up their token. Once that is done, the employee will receive an e-mail that the DUO token is setup and ready for use.

_____ **IU Advancement IQ** (ETA Web Access, Access to IUF Account Data) through One.IU.

_____ **HR HRMS eDocs Access** Please ask employee to complete both the HRMS and SIS Data Access Agreements (compliance forms) prior to submitting an “Add a new user” request. The “Add a new user” form will allow you to select what function the user will be performing. This will assist in ensuring that the correct roles and permissions are assigned to the user.

**Note**: Employee must attend training in order to obtain access to HRMS E-Docs. Please see the [HRMS Training](https://hrms.iu.edu) for a class schedule. In addition, the user must complete the [FERPA tutorial](https://hrms.iu.edu/ferpa).

_____ **SIS Training Resources**

Clients requesting access to system-wide admissions and/or student records data should use this site. Also clients who are part of an office with system-wide responsibilities should use this site to request access to admissions and/or student records data.

_____ **IUIE** Ask user to go to web site and click on the Register Tab at the top of the page and complete form.

OTHER TASKS to COMPLETE as **APPLICABLE** to the **HIRE**:

_____ Order Business Cards through **IU Document Services**

_____ Request **Long Distance Authorization Code** (just international)

_____ Confirm voicemail option (2 options: email or voice) and send email to **CMSadmin@iu.edu**
Provide Mobile Plan and Device Allowance (if applicable). See policy Mobile Plan and Device Allowance, FIN-ACC-I-480 for procedures

Authorization Form for Motor Vehicle Records Check or employees driving for IU business

Sign up for Direct Deposit for Travel Reimbursements

Provide HR Conflict of Commitment policy and Financial Conflicts of Interest in Research ACA-74 policy to employee

HIPPA Compliance Form

Drug Card

FAMS Packet (Graduate Assistant Hires)

Student Academic Agreement Form (scroll down to Student Academic Appointees and choose the form titled, “Application and Agreement for Student Academic Appointee”)

Distribute handbook (GA & Faculty) or provide HR website

Issue Keys

Update organizational chart and directory

Update Department/Unit website

Issue Procurement Card

TB – Testing @ IU Occupational Health (West side) – Complete Form on-line

CPR Training

Employee ID cards

IU Bus passes

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GIVE EMPLOYEE:

IU paycheck details available online. Direct Employee to One.IU to do a search for “Employee Center”. The employee will have access to total compensation, payroll and tax, and benefits. For questions or problems with employee center, contact your department payroll staff, your campus payroll office, or send a message through the FMS Support form.

Account Number(s) specific to their program(s)

Phone List/ Long Distance International Code

Organizational Chart

Copy Card or Copier Access Code

Emergency Action Plan

Building access (keys)

Departmental Handbook

Departmental Phone Numbers

Information about how to obtain a Parking Permit – Parking Operations

Campus Map

IU Visitors Information Center website link

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Disclosure: This form is to be used as a guideline. We acknowledge that units could have their own unique procedures and/or additional steps. You may use this form and adapt it as necessary.

Send your comments/suggestions on how to improve this form to cats@indiana.edu.