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 online. 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: __________________________

Obtain authorization from the background check as “meets university standards”.

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#)

_____ 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 askHR (to contact 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: put 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 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)

Follow path: 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.

_____ Sign up for DUO

_____ 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 for a class schedule. In addition, the user must complete the FERPA tutorial

_____ 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
- Cell Phone/Internet Agreement
- Motor Vehicle Records check
- See Travel Reimbursement Direct Deposit
- Provide policies Conflict of Commitment, HR-07-40 and Financial Conflicts of Interest in Research, ACA-74 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 website
- Issue Procurement Card (add link)
- TB – Testing @ IU Occupational Health (West side) – Complete Form on-line
- CPR Training
- Employee ID cards

GIVE EMPLOYEE:

- Your IU paycheck details are available online. Go to One.IU > Services > Employee Center > Payroll & Tax to access current and historical pay details. If you have questions or problems with employee self-service, 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

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.

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