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 HIRE (View Payroll – New Hire)

_____ 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

Visit Background Check Charges on the CATS website for up-to-date information and to access the General Information Service (GIS) background check system.

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#)
- 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 askHR for questions related to your benefits and or direct new hire to the website: Benefits at Indiana University
- Inform employee where to obtain CrimsonCard (IU ID card, charges may apply)
- Timesheet or ePTO record is generated for employee. Clock in/out employees 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 HRMS Training for 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
- Provide mobile plan and device allowance if applicable (see Mobile Plan and Device Allowance, FIN-ACC-480 policy for procedures)
- See policy Who Can Use University Vehicle, FIN-INS-07 for Authorization Form for Motor Vehicle Records Check form
- Sign up for Direct Deposit for Travel Reimbursements
- Provide policies Conflict of Interest and Commitment, UA-17 and Financial Conflicts of Interest in Research, ACA-74 to employee
- HIPPAA Compliance Form
- Drug Card
- FAMS Packet (Graduate Assistant Hires)
  - Graduate Student Academic Appointee Guide (scroll down to page 5, Terms of Student Academic Appointments and choose the link, https://vpfaa.indiana.edu/doc/application-agreement-for-student-academic-appointee.pdf)
- Distribute handbook (GA & Faculty) or provide HR website
- Issue Keys
- Update organizational chart and directory
- Update department/unit website
- Issue Procurement Card
- TB – Testing
- CPR Training
- Bus Passes

GIVE EMPLOYEE:

- Upcoming New Employee Orientation details
- IU paycheck details are 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)
- Internal Phone List
- 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.

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

Updated 1/2019