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______________________________ Biweekly 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

Beginning March 1, 2018, background checks for new and rehired candidates, in accordance with IU Background Checks policy, must be successfully completed before the candidate can begin working in a staff/temporary position at the University. See Background Check Charges activity for details.

Background Checks

Visit Background Check Charges on the CATS website for up-to-date information and to access the current background check vendor 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 ‘Access Management’ on One.IU 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 policy Conflict of Interest and Commitment, UA-17 to employee
___HIPPA 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-studentacademic-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

Campus Administrative Training Series
Budgetary Administration and Planning
Send your comments/suggestions on how to improve this form.

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.