
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, FINACC-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

Send us your comments and/or suggestions [here](#).

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.

FULFILLING *the* PROMISE