



NEW EMPLOYEE CHECKLIST

Name: _____

Department: _____

Position: _____ Account: _____

Effective Term/Date of Appointment: _____

Annual Pay Rate: _____ Hourly Rate: _____

New Hire: _____ -or- Transfer From: _____

Background Check: <http://www.hireright.com> (Charge to hiring account number)

_____ Hourly _____ Appointed Position Date Completed: _____

Background Check Consent Form: <http://www.indiana.edu/~uhrs/employment/bloomington/forms.html>
(Support staff submit electronic signature when they apply on-line. Hourly & Professional staff complete paper form. Destroy any paper that has a SSN on it after entering in system.)

FORMS: (Yes/No/NA)

_____ Offer/Acceptance Letter (print & retain in personnel file, attach to hire e-doc)

_____ Application and Resume (print & retain in personnel file)

Complete Personal Profile Forms: <http://www.indiana.edu/~uhrs/hrms/ppforms.html>

_____ ED: Shred form after hiring process is complete; entered via *maintain person* e-doc

_____ PS: staff/hourly forms submit to UHRS

_____ PSA: staff/hourly forms submit to UHRS

_____ Direct Deposit for Payroll & Travel Reimbursement (signups in Onestart Employee Center)

_____ I-9 Employment Eligibility Verification & Identification (through E-Verify at <http://www.hireright.com>)

_____ Indiana Tax Withholding WH-4 (signup in Onestart Employee Center)

_____ Federal Tax Withholding W-4 (signup in Onestart Employee Center)

_____ HRMS E-doc (must be approved before new employee can gain access to e-mail)

Note: TIME information: <http://www.fms.indiana.edu/time/> - multiple approvers

Note: ePTO Information: <http://www.indiana.edu/~uhrs/hrms/ePTO/index.html> -

OVPIA Director of Human Resources is backup approver for ePTO

_____ Cell Phone Agreement – attached signed document to additional pay e-doc
<http://www.indiana.edu/~cats/formsAndDocs/MobileDeviceResSupportContract.pdf>

ADDITIONAL THINGS TO DO:

- _____ Set up computing account: <http://kb.iu.edu/data/achn.html>
- _____ Emergency Contact Information – submit to OVPIA Chief of Staff
- _____ Order Business Cards: <http://visualidentity.iu.edu/print/stationery.shtml> - only for full time
- _____ Request Long Distance Authorization Code - COMMREQ
- _____ Confirm voicemail options - COMMREQ
- _____ Parking Authorization Memo – allows new employee to purchase a permit before e-doc
- _____ Motor Vehicle Records check: <http://www.indiana.edu/~uhrs/employment/bloomington/forms.html>
- _____ Issue Keys
- _____ Arrange time for new employee to acquire IU ID Card – building access in Poplars
- _____ Update organizational chart and directory, send organizational chart to Kim and Margaret
- _____ Update unit and OVPIA web site with name/photo – contact Web Services Specialist at 201 N. Indiana (Louise O'Connor)
- _____ Issue Procurement Card and explain usage
- _____ Notify department IT Office to request access to server, equipment, off-site computing, etc.
- _____ Establish travel arranger – additional links to share if new employee will travel abroad:
Trip insurance: <http://rmweb.indiana.edu/orm/TripInsurance.cfm> MEDEX ID, part of our group life insurance coverage: <http://hr.iu.edu/benefits/basic.html#additional> Additional travel coverage if employee has opted into the IU Personal Accident Insurance plan through CIGNA: <http://hr.iu.edu/benefits/pai.html#travel>
- _____ E-mail supervisor's checklist to supervisor and to new employee
<http://www.indiana.edu/%7ecats/formsAndDocs/supervisorsChecklist.doc>
- _____ If the new employee is going to be supervising anyone, even hourly employees, required to complete the Legal Compliance Series for Supervisors within one year:
http://www.indiana.edu/~uhrs/training/merged_index.htm

Grants:

- _____ If the employee is going to work with grants, take Kualii Coeus training class:
http://researchadmin.iu.edu/Systems/systems_kc.html
- _____ Set up MyRA Access to grants (PI needs to give delegation authority).

GIVE EMPLOYEE

- _____ Account Number(s) specific to their program(s)
- _____ Department Phone Number List
- _____ Parking Memo
- _____ Organizational Chart, Job Description
- _____ Copy Card or Copier Access Code, Shredder instructions
- _____ Location of supplies
- _____ Copy of Emergency Action Plan
- _____ Location of first aid kit
- _____ Name plate

SYSTEMS ACCESS:

Financial – FIS

- _____ Complete data access steps through Onestart (Services>Administrative Systems> Data Access) – this includes assigning an OTP Token
- _____ FIS Document (COA>FIS User>Establish new user)
- _____ IUIE: <https://www.indiana.edu/iuie/prod/IuieWelcome.html>. Register tab at the top of the page to complete form.
- _____ Attend FIS Training, Schedule is located at:
https://fdrs.fms.indiana.edu/cgi-bin/training/fis_schedule.pl

Personnel – HRMS

- _____ HRMS prefers that FIS doc be complete before HRMS web request is made. Employee should complete both the HRMS and SIS Data Access Agreements (compliance forms) prior to submitting an “Add a new user” request. In addition, the user must complete the FERPA tutorial tutorial online:
<http://registrar.indiana.edu/ferpastaff.shtml>.
- _____ Follow HRMS link on OneStart Data Access portal, or fill out form here:
http://www.indiana.edu/~hrsis/HRMS/f_approval.shtml

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.

You must attend training in order to obtain access to HRMS E-Docs. Please see the HRMS Training website (http://www.indiana.edu/~hrsis/HRMS/c_train_hrms.shtml) for a class schedule.

Purchasing – EPIC

_____ Send e-mail to Rozzie Gerstman requesting assignment of content approval role

_____ Send e-mail to Rozzie Gerstman requesting assignment of FO approval role

Students – SIS

_____ Request SIS access at <https://arms.iu.edu/> or through Onestart (Services> Administrative Systems>Data Access)

Clients requesting access to system-wide admissions and/or student records Data should use one of these sites. 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.

IU Foundation - IQ

_____ IQ Access (IUF IQ > Policies & Forms > Development Forms>IQ Access)
Enables the user to view basic university, donor and alumni information.

ETA/Affinity

_____ (IUF IQ > Policies & Forms > Administrative Forms > ETA Web Access)
For users that need detailed donor or account information an application to Affinity or ETA is required and with either application access to IQ is automatic.

IUF account signature change

_____ (IUF IQ > Policies & Forms > E-docs > Signer Change)

SUNAPSIS- International Office Module

_____ Complete Access Request Form and supporting tutorials/agreements identified on form
http://ois.iu.edu/link/iom_access_form.docx

SUNAPSIS- Study Abroad Module

_____ Complete Access Request Form and supporting tutorials/agreements identified on form
http://ois.iu.edu/link/iom_access_form.docx

Updated 10/09/12

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Link to Rozzie's new employee checklist: <http://www.indiana.edu/~cats/forms/index.php>