THE UNIVERSITY OF ALABAMA HUMAN RESOURCES

New Employee On-boarding Checklist

The goal of "on-boarding" a new employee is to provide a seamless and positive transition to working at the University. This Checklist gives managers a simple framework for the necessary steps and paperwork that needs to be completed when hiring a new employee. In addition, there are suggestions designed to help a new employee feel welcome as well as provide them with important job related information. This will in turn give the new employee the tools they need to be a productive and engaged employee. When filling vacant positions, please remember to follow appropriate UA hiring procedures. For transferring employees, coordinate with their current department for the Personnel Action form. You should contact your HR Partner if you have any questions about the on-boarding process.

Pre-Hire

_____ Extend offer using Offer Template.

_____ Complete and submit Personnel Action Form and New Hire Form. You may have to contact the prospective employee to obtain information (i.e. SSN) for the PA. **As a best practice, please submit this at least a week in advance of a new employee's start date.** This will allow the new employee timely access to needed services plus it will be required for registration for orientation once the new online registration system is implemented.

_____ Have the employee register for a New Employee Orientation session that is within their first 30 days. They will need their myBama email address and CWID to register.

_____ Inform the new employee that documentation verifying dependent relationships must be provided in New Employee Benefits Orientation. Refer the employee to the Benefits website for more information on acceptable documentation.

_____ Have employee obtain their parking permit.

_____ Identify an office space and set up computer, phone, business cards, and office supplies.

_____ Create an on-boarding schedule and/or assign an on-boarding peer.

_____ Discuss with new employee where to park, where and what time to report first day.

First Day

_____ Complete and/or collect the required new hire paperwork (if not already received)

___Direct Deposit , ___W4/A4, ___I-9*, ___Intellectual Property Agreement,

___Invitation to Disclose Covered Veterans with Disability Status Form**

***The I-9 form must be completed and signed within the first three days of employment**. *If your new employee is unable to provide acceptable documents, they may not continue working for the University until the documents are received.*

****The Invitation to Disclose Covered Veterans with Disability Status Form** *is to be completed by new employee and submitted directly to HR.*

______Give employee the Health Insurance Exchange Notice (must be given to ALL employees within 14 days of hire)

_____ Accompany new employee to Action Card office to have Action Card made.

_____ Discuss department procedures (requesting time off, appropriate attire, lunch breaks, etc).

_____ Give new employee department/college tour and introduce to co-workers.

_____ Review job responsibilities, competencies, expectations.

During First Month and Beyond

_____ Ensure that employee attends New Employee Orientation within first 30 days.

_____ Arrange for any job-related training through HRD or your department.

_____ Remind employee to take the online Right-to-Know training via the Training Academy once they receive the email notifying them of this training requirement.

_____ Review and clarify performance objectives and expectations.

Month Six

_____ Conduct Introductory Period Review and submit paperwork to Human Resources.

_____ Continue to review/clarify performance objectives and expectations.