

# 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. Following these simple steps to hire a new employee will 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. Please contact your HR Partner if you have any questions about the on-boarding process.

*Important Notes:*      1) Follow UA hiring procedures to fill vacant positions  
                                 2) Coordinate with current department for transfer employees

## 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. **This must be done 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 do so.
- \_\_\_\_\_ 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 complete 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.**
- \_\_\_\_\_ 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.