# UNC Eshelman School of Pharmacy

# New Employee Onboarding Checklist

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|  | BEFORE 1ST DAY: |
|  | EA/AA: Submit Infoporte request to hire employee |
|  | HR: Collect supporting documentation for appointment from new hire, EA/AA/MGR |
|  | HR: submit hiring action in ConnectCarolina |
|  | HR: Add to new/hires terms list |
|  | HR: Welcome email – start date, time, place, parking, etc. Reminder for I-9 documents, EEO forms, payroll documents, etc.; orientation information |
|  | HR: Setup 1st day meeting with new hire |
|  | EA/Facilities: Keys to the building/office and key form, card access badge for SOM |
|  | EA/IT: Telephone, computer and monitor, printer/photocopier/scanner/fax access and codes |
|  | EA: general office supplies |
|  | EA/IT: Pharmacy network set up and IT forms |
|  | EA/lab manager: clean work area and set up office |
|  | EA/HR: add employee to relevant listservs |
|  | Hiring supervisor: plan employee’s first assignment |
|  | Hiring supervisor: Announce new employee to the Division by email – role and bio |
|  | Hiring supervisor/EA: set up meetings with critical people for the employee’s first day |
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|  | 1ST DAY: |
|  | HR: ISSS check-in for new international employees |
|  | HR: I-9 completed and payroll forms submitted |
|  | HR: Provide with campus map and directions to OneCard office |
|  | HR: Provide relevant trainings list to new employee |
|  | HR: Show employee ConnectCarolina self-service – taxes, self-identification, emergency contact, directory updates (new office location) |
|  | HR: TIM overview |
|  | Hiring supervisor: Provide an overview of functional area – purpose and goals |
|  | Hiring supervisor: Describe how the job fits into the department |
|  | EA/Hiring supervisor: Introduce the employee to others in the workplace |
|  | EA: Make system access request for InfoPorte, ePRO, etc. |
|  | EA: Pcard |
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|  | 21 DAYS: |
|  | HR: check in with employee – benefits enrollment (healthcare deadline is 30 days from start), retirement options (deadline is 60 days from start), settling in.; reminder to complete items 3-7 if not already done |
|  | HR Check in with supervisor – job description – performance plan |
|  | Employee: Picture with communications office |
|  | Employee: Mandatory trainings completion |
|  | Employee: EHRANF/SHRA orientation attendance completion |
|  | Employee: Check directory entry for presence and accuracy |
|  | Employee: Schedule a meeting with Angela Lyght to discuss trainings/development plan |

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|  | 60 DAYS: |
|  | HR check-in |
|  | Supervisors continue to provide timely, on-going feedback and check-ins |
|  | Retirement enrollment deadline – default TSERS |
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|  | 90 DAYS: |
|  | HR check-in with employee |
|  | Supervisor: Review process related to the probationary period/annual review process |
|  | Supervisor: Complete ECA and submit to Angela Lyght |
|  | Employee: Social Security proof deadline for international employees |
|  | Employee: Voluntary feedback from new employee on process improvement/satisfaction with onboarding |
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|  | 6 MONTHS: |
|  | HR check-in |