| **Onboarding**  **Timeframe:** |  | | |
| --- | --- | --- | --- |
|  |  | | |
| **Employee:** |  | **Supervisor:** |  |
| **Start Date:** |  | **Orientation Buddy:** |  |

| **Status** | **Item** | **Assigned To** | **Due Date** |
| --- | --- | --- | --- |
| **HR: New-Hire Forms/Policies, Time Reporting, Payroll Setup, and Performance Goals** | | | |
|  | Complete I-9 and tax forms | HR | ● Before First Day |
|  | Attend UNC new employee orientation and benefits review (on 1st day or when scheduled by HR)   * [New Employee Orientation (NEO) Participant Guide](https://new.unc.edu/wp-content/uploads/sites/14619/2020/03/UNC-NEO-Booklet-2020.pdf) * [Welcome to Carolina Blue](https://new.unc.edu/) * [Milestones](https://new.unc.edu/milestones/) | Employee | ●● First Day |
|  | Complete/sign new employee orientation paperwork | Employee | ●● First Day |
|  | Give instructions on use of [TIM](https://research.unc.edu/vcr-ubc-hr/tim/) (if questions contact HR) | Supervisor | ●●● First Week |
|  | Set up [Direct Deposit](https://new.unc.edu/wp-content/uploads/sites/14619/2020/01/Payroll-Guide.pdf) and [Tax Deductions](https://new.unc.edu/wp-content/uploads/sites/14619/2020/01/Finding-and-Updating-Your-W-4-or-NC-4-in-ConnectCarolina.pdf)   * [Payroll Guide QRC](https://new.unc.edu/wp-content/uploads/sites/14619/2020/01/Payroll-Guide.pdf) | Employee | ●●● First Week |
|  | Review [HR resources](https://sph.unc.edu/sph-hr/) for working at Gillings | Employee | ●●● First Week |
|  | Understand the [important policies](https://new.unc.edu/resources/policies/) that pertain to you as an employee. Familiarize yourself with:   * [UNC-CH Employee Policies](https://new.unc.edu/unc-ch-employee-policies/) * [UNC Ethics and Policy](https://ethicspolicy.unc.edu/) * [Faculty Policies](https://academicpersonnel.unc.edu/) | Employee | ●●● First Week |
|  | Prepare work plan with employee and set performance goals in [Carolina Talent](https://hr.unc.edu/carolinatalent/) | Supervisor | ●●●● First Month |
| **IT: Onyen, PID, Email, Computer Setup, Phone Number, and Systems Access/Trainings** | | | |
|  | Provide instructions for set up of [ONYEN](https://its.unc.edu/onyen-services/) and email | HR | ● Before First Day |
|  | Order or assign existing computer | Supervisor | ● Before First Day |
|  | Get computer and request IT support/help to set up computer, printers, copier, remote access, etc.   * [EUS at the Gillings School](https://sph.unc.edu/iis/end-user-support/) * [SPH – Workstation Setup form](https://uncch.service-now.com/sp?id=sc_cat_item&sys_id=e6e72fdd1b08b010706afeee034bcb79) * [Help Request](https://help.unc.edu/sp) | Employee  (Supervisor assists) | ●● First Day |
|  | Assign phone number or request [Premium Communicator](https://phoneservices.sites.unc.edu/using-communicator/) (desktop app for hybrid/remote) | Supervisor | ●● First Day |
|  | Setup [2-Step Verification](https://its.unc.edu/2-step/) (Microsoft MFA and DUO) and install [VPN](https://uncch.service-now.com/sp?id=kb_article_view&sysparm_article=KB0010160&sys_kb_id=84362d241be4b41078c43112cd4bcb5e) (if questions, contact IT help desk) | Employee | ●●● First Week |
|  | Learn your [PID](https://pid.itsapps.unc.edu/PIDCreate/jsp/wmp.jsp) and [Onyen](https://its.unc.edu/onyen-services/) | Employee | ●●● First Week |
|  | Set up your [email](https://selfservice.unc.edu/client/self-service/#/) and create your [email signature](https://identity.unc.edu/resources/downloads/) | Employee | ●●● First Week |
|  | Review the [ConnectCarolina Course Descriptions](https://ccinfo.unc.edu/training/connectcarolina-training-course-descriptions/) with your supervisor to determine the courses you will need.   * Once you complete trainings assigned by your manager, please download and fill out the appropriate [Access Request Form(s)](https://ccinfo.unc.edu/home/access-2/access-request-forms/) and email to your manager. | Employee  (Supervisor assists) | ●●●● First Month |
|  | Familiarize yourself with [Microsoft 365](https://support.microsoft.com/en-us/office/microsoft-365-basics-video-training-396b8d9e-e118-42d0-8a0d-87d1f2f055fb?wt.mc_id=otc_home)   * [Outlook training](https://support.microsoft.com/en-us/office/outlook-training-8a5b816d-9052-4190-a5eb-494512343cca?ui=en-us&rs=en-us&ad=us) * [OneNote training](https://support.microsoft.com/en-us/office/onenote-video-training-1c983b65-42f6-42c1-ab61-235aae5d0115) * [OneDrive training](https://support.microsoft.com/en-us/office/onedrive-video-training-1f608184-b7e6-43ca-8753-2ff679203132) * [Teams training](https://support.microsoft.com/en-us/teams) | Employee | ●●●● First Month |
|  | Complete [Security Awareness Training](https://its.cloudapps.unc.edu/info_security_awareness_training/) | Employee | ●●●● First Month |
|  | Complete [FERPA Training](https://registrar.unc.edu/academic-services/uncferpa/ferpa-instructions/) | Employee | ●●●● First Month |
| **Facilities: Onsite Work Schedule, Building Location, Parking Options, and Office Space** | | | |
|  | Determine office/workstation location | Management team | ● Before First Day |
|  | Complete [work location form](https://hr.unc.edu/wp-content/uploads/sites/222/2022/02/FoW-Work-Location-Form.pdf) | Supervisor | ●● First Day |
|  | Complete [off campus equipment form](https://finance.unc.edu/wp-content/uploads/sites/298/2021/07/603-4-1f.pdf) | Supervisor | ●● First Day |
|  | Identify and provide employee parking pass options | HR / Parking Coordinator | ●● First Day |
|  | Provide key, if appropriate, and key code to kitchen | Supervisor | ●● First Day |
|  | Get [UNC One Card](https://onecard.unc.edu/get-my-card/) at One Card office   * [Mobile One Card](https://onecard.unc.edu/mobile-one-card) | Employee | ●● First Day |
|  | Tour Gillings - Rosenau Hall, McGavran-Greenberg, and the Atrium (meet staff, see kitchen / dining options, view supply cabinet, etc.) | Supervisor or delegate to: | ●●● First Week |
|  | Review emergency protocol and get emergency contact info (cell and other email) | Supervisor | ●●●● First Month |
|  | Review [Work Remote](https://its.unc.edu/workremote) tools   * [Digital Body Language](https://www.linkedin.com/learning/digital-body-language/brevity-creates-confusion?autoSkip=true&autoplay=true&resume=false&u=42563596) * [Building Connection and Engagement in Virtual Teams](https://www.linkedin.com/learning/building-connection-and-engagement-in-virtual-teams/building-connection-and-engagement-in-virtual-teams?autoAdvance=true&autoSkip=false&autoplay=true&resume=true&u=42563596) | Employee | ●●●● First Month |
|  | Review travel policies and [Concur](https://finance.unc.edu/services/travel/concur/) | Employee | ●●●● First Month |
| **Onboarding: Team Meetings/Orientation, Resources, Documents, and Job-Specific Trainings** | | | |
|  | Prepare job and/or project-specific documentation | Supervisor or delegate to: | ● Before First Day |
|  | Introduce new employee to staff | Supervisor | ●● First Day |
|  | Grant access to shared drives/Team sites | Supervisor | ●● First Day |
|  | Review job-specific info | Supervisor or delegate to: | ●●● First Week |
|  | Give overview of meetings (unit, project, institute, school) | Supervisor or delegate to: | ●●● First Week |
|  | Give overview of shared drive resources and Teams | Supervisor or delegate to: | ●●● First Week |
|  | Add name to listserv(s) | Supervisor / Comms | ●●● First Week |
|  | Add name, photo, and bio to staff web directory via the [Profile Submission Form](https://sph.unc.edu/comm/advanced-profiles-submission-form/)   * Email [Jennie Saia](mailto:jsaia@email.unc.edu) re: headshot - if there is already a photoshoot session scheduled, she can work you in. | Employee / Comms | ●●● First Week |
|  | Schedule unit/school overview – annual report, website, org chart, staff communications, general resources, etc. | Employee | ●●●● First Month |
|  | Participate in [School's orientation](https://sph.unc.edu/orientation-registration/) to learn about resources, etc. | Employee | ●●●● First Month |
|  | Review CAU Finance and Administrative Support Reference Guide   * Email [Angie Ross](mailto:Angela.Ross@unc.edu) to request a copy (eventually this resource will be published on the [SPH Finance Office’s Resources page)](https://sph.unc.edu/sph-finance/) | Employee | ●●●● First Month |
|  | Review for Business Office Lunch and Learn series for an introduction to core business topics:   * [General Orientation](https://uncch.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=b712adcc-43fb-4902-84ed-ae1d0124390c) * [Hiring Students and Temporary Staff](https://uncch.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=8958001a-c60a-4556-a70f-ae2b0121cb98) * [Purchasing and Travel](https://uncch.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=c10a5691-6e34-4fe9-aa99-ae3901157bad) | Employee | ●●●● First Month |
|  | Review the [Finance Onboarding for the Central Administrative Units (CAU)](https://sph.unc.edu/wp-content/uploads/sites/112/2023/04/CAU-Finance-Onboarding.pdf) PowerPoint | Employee | ●●●● First Month |
|  | Other: |  |  |