



## New Hire Checklist

Employee Name: \_\_\_\_\_

Job Title: \_\_\_\_\_ Hire Date: \_\_\_\_\_

Before Hiring Decision is Finalized	Date Completed / Comments
<ul style="list-style-type: none"> <li><input type="checkbox"/> Search or Appointment approval by Human Resources.</li> <li><input type="checkbox"/> Complete reference checks through SkillSurvey and/or over the phone.</li> <li><input type="checkbox"/> University Staff salary approved by second level or department budget approver.</li> <li><input type="checkbox"/> Complete online <a href="#">background check authorization form</a>.</li> <li><input type="checkbox"/> Chancellor's approval of University Staff or Faculty positions.               <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">PMR</a> emailed to <a href="mailto:Personnel.Matters@ucdenver.edu">Personnel.Matters@ucdenver.edu</a></li> </ul> </li> <li><input type="checkbox"/> If candidate is not a U.S. citizen or permanent resident, contact International Student and Scholar Services (ISSS) at <a href="mailto:ISSS@ucdenver.edu">ISSS@ucdenver.edu</a> to discuss visa options.</li> </ul>	

After Hiring Decision is Finalized	Date Completed / Comments
<ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize and sign <a href="#">offer letter</a> (select the appropriate employee category for the offer letter templates) - copy placed in personnel file.</li> <li><input type="checkbox"/> If employee needs a visa, forward appropriate visa paperwork to ISSS.</li> <li><input type="checkbox"/> <a href="#">Faculty Pledge Form</a> forwarded to Human Resources (if applicable).</li> </ul> <p><b>Ensure appropriate hiring paperwork is completed:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> HireRight I-9 E-Verify process completed/certified by department and sent to Human Resources within 3 days of hire.               <ul style="list-style-type: none"> <li><input type="checkbox"/> Social Security card reviewed for name match.</li> </ul> </li> <li><input type="checkbox"/> W-4 form completed through employee portal.               <ul style="list-style-type: none"> <li><input type="checkbox"/> If employee is not a U.S. citizen or permanent resident, they need to meet with an international tax specialist (<a href="mailto:IntlTax@cu.edu">IntlTax@cu.edu</a>) for W-4 assistance.</li> </ul> </li> <li><input type="checkbox"/> Direct Deposit form completed through employee portal.</li> <li><input type="checkbox"/> Emergency Contact info entered through employee portal.</li> <li><input type="checkbox"/> <a href="#">Personal Data Sheet</a> completed for HCM entry (if not moved from CU Careers)</li> <li><input type="checkbox"/> <a href="#">Social Security Administration (SSA) Form 1945</a> completed for Classified Staff with copy to personnel file (part of classified offer letter template).</li> <li><input type="checkbox"/> Classified Staff <a href="#">PERA Member Information form</a>.</li> <li><input type="checkbox"/> <a href="#">Employee Self ID Form</a> submitted electronically or sent to HR.</li> </ul> <p><b>HCM:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Enter hire into <a href="#">HCM</a> (Appointment must be entered for email/portal access).</li> <li><input type="checkbox"/> If HCM entry (and effective date) is after payroll cut-off for the current month, enter off-cycle pay in CU Time. Ensure any leave accruals are adjusted as needed.</li> </ul>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide parking options for first day of work.</li> </ul>	

Required Training/Immunizations	Date Completed / Comments
<p><b>All Employees:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule employee for <a href="#">New Employee Orientation</a>.</li> <li><input type="checkbox"/> Required SkillSoft Trainings (within 90 days of hire date):               <ul style="list-style-type: none"> <li><input type="checkbox"/> Discrimination and Harassment (SkillSoft code: u00067)</li> <li><input type="checkbox"/> Fiscal Code of Ethics (SkillSoft code: f00001)</li> <li><input type="checkbox"/> Information Security (SkillSoft code: u00063)</li> </ul> </li> </ul>	

<p><input type="checkbox"/> All international employees should schedule a check-in with ISSS.</p> <p><b>Optional/Based on Position:</b></p> <p><input type="checkbox"/> Required for Supervisors of Classified Staff:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Performance Management (SkillSoft code: u00062)</li> </ul> <p><input type="checkbox"/> <a href="#">Human Capital Management (HCM) Training and Access</a></p> <p><input type="checkbox"/> <a href="#">CU Careers Training and Access</a></p> <p><input type="checkbox"/> <a href="#">Finance Training</a></p> <p><input type="checkbox"/> <a href="#">Procurement Card Training</a></p> <p><input type="checkbox"/> <a href="#">Fiscal Certification</a> if Officer or designated by Officer.</p> <p><input type="checkbox"/> <a href="#">Environmental Health and Safety Training</a> or contact 303-724-0345.</p> <p><input type="checkbox"/> <a href="#">HIPAA Training</a> (within 30 days of hire) (SkillSoft code: a00020)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employee will receive notification via email if training is required. Questions can be sent to <a href="mailto:HIPAA@ucdenver.edu">HIPAA@ucdenver.edu</a> or 303-724-1010.</li> </ul> <p><input type="checkbox"/> Immunizations: contact Occupational Health Clinic at 303-724-9030 (will perform risk assessment for potential occupational exposures)</p> <p><b>If employee will be an investigator or research coordinator, both on-line courses below must be completed with a passing score prior to submitting a human research protocol:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">HIPAA Research Course / CITI Basic Course</a> - Questions can be sent to <a href="mailto:COMIRB@ucdenver.edu">COMIRB@ucdenver.edu</a> or 303-724-1055.</li> <li><input type="checkbox"/> In addition, if the employee is a PRA working at a UCH facility and will be dealing with human research subjects, you must contact Kim Dimmitt at <a href="mailto:Kimberly.Dimmitt@uch.edu">Kimberly.Dimmitt@uch.edu</a> or 720-848-7807 to get scheduled for a UCH orientation.</li> </ul>	
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Prepare the Department	Date Completed / Comments
<p><input type="checkbox"/> Talk with current team members about the new employee's role &amp; responsibilities.</p> <p><input type="checkbox"/> Send email or post an announcement for other work groups about the new employee's arrival. Include individuals in other departments who will be working with the new employee.</p> <p><input type="checkbox"/> Update employee's HCM "Campus 1" telephone number &amp; mark it as Preferred.</p> <p><input type="checkbox"/> Update organizational chart and telephone contact lists.</p> <p><input type="checkbox"/> Remind team/department to update email groups.</p> <p><input type="checkbox"/> Identify at least one individual who will act as key contact within the department.</p> <p><input type="checkbox"/> Make lunch plans for the first few days.</p>	

Prepare the Work Area	Date Completed / Comments
<p><input type="checkbox"/> Order a computer if necessary. If a new computer is not needed, make sure current computer is functional, all software installed, etc.</p> <p><input type="checkbox"/> Ensure email account access.</p> <p><input type="checkbox"/> Request keys (main door, office, desk, filing cabinets, etc.).</p> <p><input type="checkbox"/> Request appropriate <a href="#">systems/program access</a></p> <p><input type="checkbox"/> Order <a href="#">telephone service</a> or if employee will be using an existing telephone extension, reset password.</p> <p><input type="checkbox"/> Request <a href="#">long distance calling code</a>.</p> <p><input type="checkbox"/> Request cell phone (if applicable).</p> <p><input type="checkbox"/> Order name plate and/or name tag.</p> <p><input type="checkbox"/> Order <a href="#">business cards</a>.</p> <p><input type="checkbox"/> Request <a href="#">A-Card</a> and/or <a href="#">Travel Card</a>. (if applicable)</p>	

During Employee's First Day	Date Completed / Comments
<p><input type="checkbox"/> Personally welcome new employee &amp; show them their work area.</p> <p><input type="checkbox"/> Describe the orientation/training plan for the first few days.</p>	

<ul style="list-style-type: none"> <li><input type="checkbox"/> Introduce coworkers/have a short welcome meeting with the department.</li> <li><input type="checkbox"/> Introduce key contact(s) within the department who will be available to answer questions if you are not.</li> <li><input type="checkbox"/> Give a tour including restrooms, kitchen, emergency exits, etc.</li> <li><input type="checkbox"/> Complete HireRight I-9 E-Verify process.</li> <li><input type="checkbox"/> Have employee sign any forms required to obtain the tools for their job.</li> <li><input type="checkbox"/> Describe or have a list of regular meetings and other regularly scheduled items that the employee should place on their calendar.</li> <li><input type="checkbox"/> Describe lunch plans for the first few days.</li> <li><input type="checkbox"/> Provide a staff list with telephone numbers, email addresses, etc. that includes a list of main contacts. <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide directions on how to use telephone system, access computer, etc.</li> </ul> </li> <li><input type="checkbox"/> Show employee where or how to request office supplies.</li> <li><input type="checkbox"/> Provide University smoking policy and information about smoking areas.</li> <li><input type="checkbox"/> Allow time for employee to set up work space, voicemail, email, get ID/access card, EcoPass, and parking pass (as necessary)</li> <li><input type="checkbox"/> Give a simple initial work assignment.</li> <li><input type="checkbox"/> Meet with new employee at the end of the day to answer questions and find out how the day went.</li> </ul>	
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During the First Week of Hire	Date Completed / Comments
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review job description and performance expectations, explain why their job is important, and how it relates to unit &amp; university goals <ul style="list-style-type: none"> <li><input type="checkbox"/> Begin drafting the <a href="#">performance plan</a> (select the appropriate employee category for the performance plan templates).</li> </ul> </li> <li><input type="checkbox"/> Review process for requesting leave and documenting time off, policies about requesting vacation, and review process for completing <a href="#">work record</a>. (if needed)</li> <li><input type="checkbox"/> Review required training for all employees and position-specific training</li> <li><input type="checkbox"/> Review organizational charts and define department's function and interrelationships with other departments.</li> <li><input type="checkbox"/> Review how often to check-in about assignments and when &amp; how to ask for help.</li> <li><input type="checkbox"/> Provide copies of, or links to, handbook, policy manuals, office procedures, and <a href="#">University policies</a>.</li> <li><input type="checkbox"/> Review <a href="#">OIT policies</a> (security, proper vs. improper use, etc.)</li> <li><input type="checkbox"/> Review work schedule, meal periods and breaks.</li> <li><input type="checkbox"/> Review overtime with non-exempt (eligible for overtime) employees <ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss overtime needs, approvals required, and department standards for overtime and comp time.</li> </ul> </li> <li><input type="checkbox"/> Review policies regarding visitors, personal phone calls, copies, faxes, etc.</li> <li><input type="checkbox"/> Show employee how to access the <a href="#">CU Denver website</a> or <a href="#">CU Anschutz website</a> &amp; <a href="#">on-line campus directory</a>.</li> <li><input type="checkbox"/> Review how to handle confidential information based on employee's position.</li> <li><input type="checkbox"/> Review building and workplace security procedures, safety/accident procedures, location of first aid supplies, how to report hazards, location of emergency assembly point, fire alarms, extinguishers, etc.</li> <li><input type="checkbox"/> Show how and where to send and receive U.S. and campus mail, and locations of U.S. mailboxes for personal mail.</li> <li><input type="checkbox"/> After the employee's first week, set a regular schedule to meet.</li> <li><input type="checkbox"/> Remind employee of 30-day requirement for submitting benefit elections to <a href="#">Employee Services</a>.</li> </ul>	

During the First Month of Hire	Date Completed / Comments
<ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize the <a href="#">performance plan</a>.</li> <li><input type="checkbox"/> Meet as needed to answer questions.</li> </ul>	