



New Hire Checklist

Employee Name: _____

Job Title: _____ Hire Date: _____

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

After Hiring Decision is Finalized	Date Completed / Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Finalize and sign offer letter (select the appropriate employee category for the offer letter templates) - copy placed in personnel file. <input type="checkbox"/> If employee needs a visa, forward appropriate visa paperwork to ISSS. <input type="checkbox"/> Faculty Pledge Form forwarded to Human Resources (if applicable). <p>Ensure appropriate hiring paperwork is completed:</p> <ul style="list-style-type: none"> <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"> <input type="checkbox"/> Social Security card reviewed for name match. <input type="checkbox"/> W-4 form completed through employee portal. <ul style="list-style-type: none"> <input type="checkbox"/> If employee is not a U.S. citizen or permanent resident, they need to meet with an international tax specialist (IntlTax@cu.edu) for W-4 assistance. <input type="checkbox"/> Direct Deposit form completed through employee portal. <input type="checkbox"/> Emergency Contact info entered through employee portal. <input type="checkbox"/> Personal Data Sheet completed for HCM entry (if not moved from CU Careers) <input type="checkbox"/> Social Security Administration (SSA) Form 1945 completed for Classified Staff with copy to personnel file (part of classified offer letter template). <input type="checkbox"/> Classified Staff PERA Member Information form. <input type="checkbox"/> Employee Self ID Form submitted electronically or sent to HR. <p>HCM:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Enter hire into HCM (Appointment must be entered for email/portal access). <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. 	
<ul style="list-style-type: none"> <input type="checkbox"/> Provide parking options for first day of work. 	

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

<p><input type="checkbox"/> All international employees should schedule a check-in with ISSS.</p> <p>Optional/Based on Position:</p> <p><input type="checkbox"/> Required for Supervisors of Classified Staff:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Performance Management (SkillSoft code: u00062) <p><input type="checkbox"/> Human Capital Management (HCM) Training and Access</p> <p><input type="checkbox"/> CU Careers Training and Access</p> <p><input type="checkbox"/> Finance Training</p> <p><input type="checkbox"/> Procurement Card Training</p> <p><input type="checkbox"/> Fiscal Certification if Officer or designated by Officer.</p> <p><input type="checkbox"/> Environmental Health and Safety Training or contact 303-724-0345.</p> <p><input type="checkbox"/> HIPAA Training (within 30 days of hire) (SkillSoft code: a00020)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employee will receive notification via email if training is required. Questions can be sent to HIPAA@ucdenver.edu or 303-724-1010. <p><input type="checkbox"/> Immunizations: contact Occupational Health Clinic at 303-724-9030 (will perform risk assessment for potential occupational exposures)</p> <p>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:</p> <ul style="list-style-type: none"> <input type="checkbox"/> HIPAA Research Course / CITI Basic Course - Questions can be sent to COMIRB@ucdenver.edu or 303-724-1055. <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 Kimberly.Dimmitt@uch.edu or 720-848-7807 to get scheduled for a UCH orientation. 	
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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 & 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 & 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 systems/program access</p> <p><input type="checkbox"/> Order telephone service or if employee will be using an existing telephone extension, reset password.</p> <p><input type="checkbox"/> Request long distance calling code.</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 business cards.</p> <p><input type="checkbox"/> Request A-Card and/or Travel Card. (if applicable)</p>	

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

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