**SHRA**

**New Employee Onboarding Checklist**

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| **DAY 1: UNIVERSITY NEW EMPLOYEE ORIENTATION** |
| *New SHRA permanent employees must attend new employee orientation on their first day. The classroom-based orientation provides an overview of the programs, services, policies and benefits offered by the University. Employees must attend a Welcome to Carolina Blue session before beginning work. Sessions are held every Monday (or alternate day when the University is closed for a holiday) at the Friday Center from 8 AM – 1 PM.* More information about the New Employee Orientation Program can be found here: <https://hr.unc.edu/employees/policies/shra-policies/new-employee-orientation-shra-permanent/>  |
| * **ATTEND NEW EMPLOYEE ORIENTATION**
* **OBTAIN UNC ONE CARD**
	+ If you did not obtain your UNC One Card at new employee orientation you will need to visit the One Card Office on the third floor of the UNC Student Stores (open Monday-Friday 8 AM – 4:30 PM)
	+ More information about UNC One Card’s can be found here: <https://onecard.unc.edu/>
* **COMPLETE ELECTRONIC I-9**
	+ Part I should be completed prior to start date/ Part II must be completed within 3 days of start date
	+ Required I-9 documents/IDs will need to be presented during NEO
* **DIRECT DEPOSIT FORM**
	+ Any future changes to your direct deposit must be initiated in person with a photo ID at the payroll office
	+ More information about direct deposit can be found here: <https://finance.unc.edu/departments/strategic-sourcing-payment/payroll/employee-direct-deposit/>
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| **DAY 1: SOM IT/HR ORIENTATION** |
| *The SOM IT/HR orientation was designed to better streamline the onboarding process for SOM staff, faculty, postdocs, and temporary employees. Employees must attend the SOM IT/HR orientation on their first day after NEO. Sessions are held every Monday (or alternate day when the University is closed for a holiday) at the Friday Center from 2 PM – 4:30 PM.*  |
| * **UNC SCHOOL OF MEDICINE OVERVIEW**
* **SECURITY & IT RESOURCES OVERVIEW**
* **PID ACTIVATION**
	+ Your PID is activated during the background check process and can be obtained by contacting your HR consultant.
	+ The Person ID Number (PID) is an identification number assigned to all persons, including alumni, affiliated with the University. This number is designed to be a universal number (PID or Person ID) that is unique to the University of North Carolina at Chapel Hill.
* **ONYEN SERVICES** (Only Name You’ll Ever Need)
* An ONYEN is a mechanism used to access various programs within UNC, including e-mail setup. You will

need to know your PID to obtain your ONYEN; this should be given to you by your HR Consultant.   * To create your ONYEN go to: <https://its.unc.edu/onyen-services/>
* then click “Create or Manage Onyen”
* then click “Create an Onyen”
* complete the requested self-identification information
* lastly, click submit
* Once you create your ONYEN, you will then need to go to <https://selfservice.unc.edu/>  to create your email

account.* **EMAIL ACCOUNT CONFIGURATION**
* You can obtain an @med email account online by following the below instructions:
* go to: <https://selfservice.unc.edu/login.aspx> and log in with your ONYEN credentials
* click “Email Sign-Up” and click the Submit button to request your new email account
* after receiving confirmation of account creation, configure aliases using steps below:
* click on the “My Aliases” tab on the left
* click on “Add Alias” button and then hit next
* The School of Medicine recommends using first\_last@med.unc.edu as your email alias.  Enter

the desired alias in the text entry box and choose “med.unc.edu” in the drop down menu.  Click on “add alias” * after alias is added click on the “back” button, then click on the “Set Primary” button
* choose the email address with either your first\_last@med.unc.edu or your

ONYEN@med.unc.edu and click on “Set Primary Alias”* **TWO-STEP VERIFICATION**
* For security purposes there are two different 2-step verification systems at UNC to keep you safe. You will need to sign up for both Microsoft’s Multi-Factor Authentication (MFA, used for all Office 365 services) and Duo (used for all other UNC systems protected by 2-step verification).
* Instructions for both systems are available here: <https://its.unc.edu/2-step/>
* **DEPARTMENT SHARED DRIVE(S) AND LISTSERVE(S)**
* Please see your HR Consultant(s) or department designee for further instructions to ensure you are added to department specific listserve(s) and have access to the necessary shared folder(s).
* **TIME INFORMATION MANAGEMENT (TIM) OVERVIEW**
* You will need to complete the on-line Computer Based Training (CBT) based on your classification (SHRA/EHRA Exempt or Non-Exempt).
* Once you complete the training please return your Certificate of Completion to your HR Consultant.
* Training modules can be accessed here: <https://finance.unc.edu/departments/training/#pane-0-4>
* TIM questions should be directed to your HR Consultant(s)
* **CONNECTCAROLINA SELF-SERVICE OVERVIEW**
* Access ConnectCarolina here: <https://connectcarolina.unc.edu>
	+ click the SelfService drop down on the left side
	+ click on any of the associated links
* Tax forms, self-identification, emergency contact, directory updates
* Ensure emergency contact information is listed
* **VERIFY YOUR INFORMATION WITHIN THE CAMPUS DIRECTORY + ALERT CAROLINA**
* The campus directory is where you can update your address, emergency contact, and personal contact information. Any address changes with the campus directory will update records with Payroll as well as Benefit Vendors.
* Visit: <https://directory.unc.edu/dirSearch/view.htm> and sign in with your ONYEN to make changes.
* Sign up for Alert Carolina: <https://alertcarolina.unc.edu/>. Register your cell phone. Students, faculty and staff, be sure to register your cell phone number in the campus directory to receive emergency text messages from the University.
* **COMPLETE REQUIRED TRAININGS** (if time permits)
* **HIPAA Certification**. Go to the following link to complete HIPAA training: <http://www.med.unc.edu/security/hipaa-train>. After completing the required HIPAA certification, please print out your confirmation sheet and return to your HR Consultant.
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| **WEEK ONE: DEPARTMENT SPECIFIC ORIENTATION** |
| * **SCHOOL OF MEDICINE ID BADGE**
* You will be given a Photo ID Badge Request Form from your designated HR Consultant. This form will allow you to obtain a SOM ID Badge and will outline the necessary access to assigned buildings if appropriate.
* To obtain a SOM ID Badge visit the Photo ID Office in G41 Macnider Hall
* Contact information: 919-843-3787; if no answer call 919-966-2441
* Open Monday - Friday, 8:30 AM – 4:30 PM
* Please see your HR Consultant or department designee for further instructions.
* **OBTAIN A PARKING PERMIT**
* You will be given parking information during day one from your department parking coordinator. If you have questions regarding parking, please contact your HR Consultant or department designee.
* Parking passes must be collected at the Public Safety Building 285 Manning Drive.
* **OBTAIN ANY NECESSARY KEYS, SUPPLIES, ETC**
* Please see your HR Consultant or department designee for more information.
* **REVIEW DEPARTMENT SPECIFIC POLICIES**
* Please see your HR Consultant or department designee for more information.
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| **FIRST 30/60/90 DAYS: EMPLOYEE SELF-PACED ORIENTATION** |
| * **MAKE BENEFITS ELECTIONS WITHIN 30 DAYS OF START DATE**
* Be sure that you have signed up for benefits prior to the enrollment deadline (within 30 days of your official date of hire); need active ONYEN (delay enrolling due to transmittal of new hire to state health plan)
* **MAKE RETIREMENT ACCOUNT ELECTION WITHIN 60 DAYS OF START DATE**
* Be sure that you returned to UNC Benefits Office (within 60 days of your official date of hire)
* Access the retirement plan acknowledgement form here: <https://hr.unc.edu/files/2017/10/Retirement-Election-Form.pdf>
* **ONLINE EMPLOYEE TAX FORMS**
* Resources to learn how to access online tax forms can be found here: <https://ccinfo.unc.edu/featured-resources/online-employee-tax-forms/>
* You can view and make changes to your W-4 and NC-4 tax forms via the SelfServive menu in ConnectCarolina
* **COMPLETE REQUIRED TRAININGS**
* **UNC Standard on HIPAA Sanctions.** Please review the UNC at Chapel Hill Standard on HIPAA Sanctions here: <https://unc.policystat.com/policy/5389231/latest/>
* **Health & Safety Orientation**.  You will receive a letter from Health & Safety concerning a Health & Safety class you need to attend.  If you are unable to attend the class you can complete this on line.  The first page of the EHS website will provide explanations of the appropriate training you need to take based on your role: <https://ehs.unc.edu/training/>. If completed on line, please print out the confirmation sheet and return to your HR Consultant. To view your specific EHS Compliance Portal go to: <https://ehs.cloudapps.unc.edu/EHS/>
* **Title IX Awareness and Violence Prevention for Staff** (takes approximately 30-45 min.) You will receive an email notification to complete this training from the EEO Office. Please print out the confirmation sheet and return to your HR Consultant. To complete this training, please go to: [https://web.archive.org/web/20150910135311/http://slate.workplaceanswers.com/uncchapelhill/](https://web.archive.org/web/20150910135311/http%3A//slate.workplaceanswers.com/uncchapelhill/)
* **Conflict of Interest Training** (Need ONYEN). To complete this training, please go to: <https://apps.research.unc.edu/coi-training/>
* **OTHER (Job/Lab specific)** Please check with your supervisor for any additional training or system access that you may need.
* **EXPLORE ADDITIONAL TRAINING RESOURCES**
* **Lynda.com** is a UNC Chapel Hill licensed online video-training library that has more than 2,400 software, career development, and technology training titles that you can access from anywhere using an internet browser and your ONYEN login. More information can be found here: <https://software.sites.unc.edu/lynda/>
* **UNC Human Resources Organization & Professional Development** provides many learning opportunities for all UNC-Chapel Hill employees by coordinating, designing and delivering specialized training programs and organizing development activities to team. Training programs and resources are free to all full-time SHRA and EHRA employees at UNC-Chapel Hill. For a full list of courses offered and/or to register for professional development courses please visit: <https://hr.unc.edu/training/catalog/>
* **Microsoft IT Academy (MSITA):** <https://software.sites.unc.edu/it-academy/>
* **Tuition & Fee Waivers:** <https://hr.unc.edu/benefits/educational-assistance/tuition-waivers/>
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| **PERFORMANCE MANAGEMENT** |
| * **PROBATIONARY PERIOD**
* All SHRA permanent employees are subject to a 12 month probationary period. The probationary period provides an opportunity for a new employee to demonstrate the ability to perform the essential functions of his/her job. Employees in their probationary periods receive leave, total state service credit, retirement and health benefits. They are not eligible for severance pay or priority reemployment consideration.
* **POSITION DESCRIPTION PROVIDED DURING WEEK ONE**
* **PERFORMANCE PLAN WITHIN FIRST 60 DAYS**
* This performance plan is formulated by your supervisor and will outline what duties are expected of you during your employment. The performance plan will also be the tool used to perform quarterly (if probationary), interim and annual reviews.
* **EMPLOYEE COMPETENCY ASSESSMENT WITHIN FIRST 90 DAYS**
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| **USEFUL LINKS/WEBSITES** |
| * **GENERAL POLICY & RESOURCE INFORMATION**
* **General policies**: <https://new.unc.edu/resources/policies/>
* **University’s personal use policy**: <http://www.unc.edu/chan/policies/personal_use.html>
* **University’s policy on the Privacy of Electronic Information**: <http://www.unc.edu/campus/policies/elec_info.html>
* **UNC Map**: <https://maps.unc.edu/>
* **Town of Chapel Hill bus routes & schedules**: <https://www.townofchapelhill.org/town-hall/departments-services/transit/routes-schedules/all-routes-schedules>
* **ConnectCarolina Self-Service** (view paystub, change tax forms): <https://connectcarolina.unc.edu>
* **Benefits at UNC**: <https://hr.unc.edu/benefits/>
* **SHRA SPECIFIC**
* SHRA Policies: <https://hr.unc.edu/employees/policies/shra-policies/>
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| **CONTACT INFORMATION** |
| * **HUMAN RESOURCES TEAM**
* Name: Contact Information: ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Name: Contact Information: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **INFORMATION SYSTEMS TEAM**
* Start with Bomgar Chat
* Contact 919-962-HELP
* Online resources: <https://its.unc.edu/>
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