NEW STAFF EMPLOYEE PROCESSING

Employee Name _____ Start Date _____ Employing Department _____

YES N/A

Forms can be located on TAMHSC Payroll & HR forms page

Forms with an * should have a copy retained for the personnel file.

BEFORE NEW EMPLOYEE'S START DATE:

- ☐ Receive confirmation that a background check has been completed
- ☐ ☐ Submit the Verification of Degree(s) and/or Licensure Release Form, if applicable.
- ☐ ☐ Create UIN, if applicable
- ☐ PD signed by supervisor (signed/unsigned by employee)
- ☐ Offer Letter with supervisor's signature (signed/unsigned by employee)
- ☐ Application (signed/unsigned by employee)

ON NEW EMPLOYEE'S START DATE:

- ☐ HSC Account – Submit EPA – Once the EPA is approved the HSC Account is approved. Please review: https://helpdesk.tamhsc.edu/account-creation-process/
- ☐ I-9 Employment Eligibility Verification (Employee must complete section 1 of the I-9 on or before the first day of employment. It is recommended to print the Employee Receipt of Electronically Filed Form I-9).
- ☐ ☐ Direct Deposit Authorization Form (done through Single Sign-On)
- ☐ New Employee Orientation Checklist* (not required)
- ☐ New employee (EE) completes the New Employee Online Orientation* (The Benefits Guide can be accessed for additional benefit information.)
- ☐ ☐ Use HR liaison Instructions to enroll benefits-eligible employee into iBenefits, print, give new EE instructions. Liaisons may enroll new employees into iBenefits between 60 days before hire date until 20 days after hire date. If benefits are to begin **ON** start date, the new EE **must enroll in iBenefits within 7 days of start date.** If the new EE does not enroll within the first 20 days, paper forms must be used before the end of the 60th day. New EE may change benefit choices anytime during the first 60 days of employment. If a direct transfer from another member of the Texas A&M System do not put into iBenefits; benefits will automatically transfer.
- ☐ ☐ If new EE is ORP Eligible, provide copies of An Overview of TRS and ORP & Selecting ORP Instructions, and ensure completion of Form HR 12.
- ☐ ☐ If new EE was previously eligible or participated in ORP ensure completion of Form HR 11.

IMMEDIATELY AFTER START DATE:

- ☐ Conduct Department Orientation (ID Badge, keys, tour of work area, introductions, parking permit/info, etc.)
- ☐ ☐ If new EE is a Foreign National: E-mail address (for Glacier)
- ☐ ☐ If new EE is a Permanent Resident: Secure copy of Permanent Resident Card (Form I-551).
- ☐ ☐ If new EE is transferring within TAMHSC: Request copy of personnel file to be sent to HR

SCAN THE FOLLOWING DOCUMENTS IN ORDER TO PAYROLL INBOX (9.0) IN LASERFICHE:

- ☐ EPA Coversheet
- ☐ Copy of page 1 (this page) of this checklist (New Staff Employee Processing Checklist)
- ☐ Employee Personal Data Form (5 pages)
- ☐ Photocopy of New Employee's Social Security Card (see note below)
- ☐ ☐ (Males only) Selective Service registration status
- ☐ ☐ For new positions: Signed Position Request form with HR Tracking Number
- ☐ ☐ Copy of Hiring Certificate* (or document for posting waiver, transfer in, etc.)
- ☐ Signed Offer Letter*
- ☐ Background Check confirmation from HR, and other document/memos specific to this hire.
- ☐ Prior State Service Form (required whether or not the new EE has prior state service)
- ☐ Form W-4
- ☐ Training Needs Assessment Form
- ☐ ☐ If new EE is 18 years of age or younger: Minor Release Form*
- ☐ ☐ If new EE is ORP Eligible: ORP Information Acknowledgement Form
- ☐ ☐ If new EE has prior ORP Service: Prior ORP Information Acknowledgement form (can be sent
- ☐ ☐ later) If new EE is a foreign national: Glacier Paperwork
- ☐ ☐ If new EE is a Permanent Resident: Copy of Permanent Resident Card

I certify that all steps in this checklist have been completed by the appropriate personnel

_____ _____

Hiring Manager or Departmental Coordinator Signature Date

NOTE: Disclosure of an employee's Social Security Account Number is required as a condition of employment with the A&M System. It is the HSC's policy to require a photocopy of the new employee's Social Security card to ensure correct name and account number.

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Employee Name _____ Start Date _____ Employing Department _____

SCAN THE NEW EMPLOYEE'S PERSONNEL FILE DOCUMENTS IN ORDER TO HR 9.0 INBOX

YES	NO/NA	
☐		Copy of this page (page 2) of this checklist (New Staff Employee Processing Checklist)
☐		Position Description (signed by supervisor AND employee)
☐		Application (signed by employee)
☐		Offer Letter (signed by supervisor AND employee)
☐		Workers Compensation Notice
☐		New Employee Acknowledgment Form
☐	☐	(Males only) Selective Service Registration Status Form & Selective Service Verification, if applicable.
☐		Data Use and Confidentiality Agreement
☐		Hiring Certificate
☐	☐	Hiring Matrix
☐	☐	The hired employee's Interview Record
☐	☐	Reference Check Verification
☐		Background Authorization and Disclosure FORM (the confirmation email received from HR should *NOT* be placed in the personnel file)
☐	☐	Other documents including

- New Employee Orientation Checklist
- Resume
- Any Correspondence related to employment
- Documentation of specialized training completions (other than those recorded in TrainTraq)
- Documentation concerning Educational Release Time, if applicable
- Documentation concerning Alternate Work Location and/or Flexible Work Schedule, if applicable
- Documentation concerning External Employment or Dual Employment

REMOVE from personnel file:

- Any medical info, sick leave documentation or similar (should be filed in a separate confidential file).
- I-9 forms and accompanying documentation (if found, remove and send to Payroll via Laserfiche).
- Formal employee complaints, internal or external (should be filed in a separate confidential file).
- Any documents not relevant to the employment relationship.
- Background check confirmation emails received from HR or Security Sensitive Release forms (Remove and shred. Payroll and HR Services maintains the master forms).
- W-4s, Direct Deposit Authorizations, photocopies of Social Security cards, benefit forms, supplemental Payroll forms, etc. (Records with personally identifiable information about the employee should be removed from file and shredded to minimize risk of identity theft. Payroll forms (EPA, W-4, Direct Deposit Authorizations, etc.) are retained by Payroll & HR Services. Benefit forms are retained by System Benefits Administration.)

COMMENTS:

I certify that all steps in this checklist have been completed by the appropriate personnel.

Hiring Manager or Departmental Coordinator Signature _____ Date _____

NOTE: Disclosure of an employee's Social Security Account Number is required as a condition of employment with the A&M System. It is the HSC's policy to require a photocopy of the new employee's Social Security card to ensure correct name and account number. *Dec 2014*