NEW EMPLOYEE – DEPARTMENT/UNIT CHECKLIST

This checklist is to be used for **permanent employees** - classified staff, academic staff, and faculty. The purpose of this checklist is to guide the hiring department/unit through the hiring of a chosen candidate; and to ensure the proper forms and notifications are submitted to SoE and campus support organizations.

EMPLOYEE INFORMATION

Employee Name: _____

Employee Title: _____

Employee Department/Unit: _____

EMPLOYEE START DATE

Start Date is the official date the employee is on payroll as shown in his/her letter of offer; and as submitted on the JEMS Hire Form for classified staff, or as entered electronically in JEMS Hire.

Start Date: _____ / _____ / _____

REQUESTOR INFORMATION

Requestor Name: _____   Requestor Email: _____

ROLES AND RESPONSIBILITIES

The requesting department is responsible for making sure all tasks on this list get done. Do not assume that all tasks are complete after a form or notice is submitted.

The support organizations that receive those forms and notifications will make every effort to complete tasks in a timely manner. Unless otherwise specified below, expect a RESPONSE to submissions within 3 business days. COMPLETION of most tasks will take longer than 3 business days. Late or missing forms and notifications are the responsibility of the hiring department or unit. Please plan accordingly and submit information as early as possible.

CHECKLIST STATUS

This checklist is:

☐   In progress
        Last updated by: _____
        Last updated on: _____

☐   Complete – it is the department's responsibility to mark this list complete
        Completed by: _____
        Completed on: _____

Please submit completed checklist to the SoE Business Office via email to
bo@education.wisc.edu

NEW EMPLOYEE - TASKS BEFORE START DATE

Pre-Offer Hire Information – Classified Only

Submit employee information to SoE HR Rep. Do NOT send Social Security Numbers, call SoE HR Rep with SSN.

- ☐ JEMS CHRIS Information Submitted
  Date submitted: _____ / _____ / _____

- ☐ not applicable

Offer Letter

Classified Staff – letters are generated at the division level. Employee information must be given to your divisional HR representative 7-10 business days prior to employee's start date.

- ☐ Employee information sent to divisional HR representative
  Date sent: _____ / _____ / _____

- ☐ Offer letter generated by division and sent to department
  Date sent: _____ / _____ / _____

- ☐ Offer letter signed by supervisor and sent to SoE HR Rep
  Date sent: _____ / _____ / _____

- ☐ Offer letter signed by SoE HR Rep and sent to department
  Date sent: _____ / _____ / _____

- ☐ Offer letter sent to employee
  Date sent: _____ / _____ / _____

- ☐ not applicable

Offer Letter – cont.

Academic Staff – offer letter templates are available from your divisional HR Representative. Offer letters for Academic Staff must be signed by the employee's supervisor and the Assistant Dean for HR prior to being sent to the employee.

☐ Offer letter drafted by department

☐ Offer letter signed by new employee's supervisor
Date signed: ____ / _____ / _____

☐ Offer letter sent to divisional HR Representative
Date sent: ____ / _____ / _____

☐ Signed offer letter returned to department
Date received by department: ____ / _____ / _____

☐ Offer letter sent to employee
Date sent: ____ / _____ / _____

☐ not applicable

Faculty - offer letter templates are available from your divisional HR representative. The Department chair must sign a faculty offer letter before it is sent to the employee. All faculty offer letters must be reviewed by the Assistant Dean for HR before it is sent to the employee.

☐ Offer letter drafted by department

☐ Offer letter signed by department chair
Date signed: ____ / _____ / _____

☐ Offer letter reviewed by Assistant Dean for HR
Date reviewed: ____ / _____ / _____

☐ Offer letter sent to employee
Date Sent: ____ / _____ / _____

☐ not applicable

Signed Offer Letter or Written Acceptance of Offer

Division office must receive a signed letter of offer or a written acceptance of offer; as well as start date, and standard work hours or percentage of FTE at least 7-10 business days prior to employee start date.

☐ Acceptance of offer received by department
Date received: _____ / _____ / _____

☐ Acceptance of offer sent to division office
Date sent: _____ / _____ / _____

Establish a Personnel File

The SoE Business Office will create and manage the personnel file of record for all SoE employees. This file must contain all appointment related documents – resume, application, job description, evaluations, etc. If you have questions about what should be sent to the SoE Business Office for the personnel file of record, please contact your SoE HR Rep.

☐ All appointment related document sent to SoE HR representative
Date sent: _____ / _____ / _____

The departmental personnel file is not considered the personnel file of record, but may be maintained by the department with both appointment information and historical records as desired.

☐ Personnel file created by department

Background check

Submit background check request:
http://businessoffice.education.wisc.edu/bo/hr-payroll-benefits/cbc/cbc-request-form

☐ Background check request submitted
Date submitted: _____ / _____ / _____

Hire Information – Academic Staff and Faculty Only

After acceptance is received from the employee, enter hire information:

Academic Staff and Faculty
Enter hire information into JEMS Hire.
https://uwservice.wisc.edu/hrs/jems/

☐ JEMS Hire Information Entered
Date entered: _____ / _____ / _____

☐ not applicable

Funding

You will receive an automated email confirming approval of the hire in HRS. After that email is received, add new funding in HRS. Appointment level funding only.
https://kb.wisc.edu/hrs/page.php?id=15181

☐ Funding added to appointment in HRS
Date added: _____ / _____ / _____

Employment Forms

I-9 Submission:

Department enters information into HireRight prior to employee start date.

☐ Information entered into HireRight
Date entered: _____ / _____ / _____

Department approval and document review required by 3rd day of employment.
NOTE: If ID verification and approval is not completed by 3rd day of employment, the employee will be taken off payroll.

☐ Approval and document review complete
Date completed: _____ / _____ / _____

The forms below must be completed and submitted to:
Payroll & Benefits
21 N. Park Suite 5101

W-4: https://uwservice.wisc.edu/docs/forms/pay-employee-withholding.pdf

☐ W-4 completed and sent to Payroll & Benefits
Date sent: _____ / _____ / _____

Direct Deposit: https://uwservice.wisc.edu/docs/forms/pay-direct-deposit.pdf

☑ Direct Deposit form completed and sent to Payroll & Benefits
Date sent: _____ / _____ / _____

Benefits

It is the Department's responsibility to ensure the employee completes benefit forms within 30 days of start date.

Be sure employee registers for Benefits 101. A valid NetID is required to register.
More info on Benefits 101 can be found online:
http://www.bussvc.wisc.edu/ecbs/benefits/New_Employee_PDFs/Benefits101_2010_UW1037.pdf

☐ Employee registered for Benefits 101

Benefits – cont.

It is recommended that employee completes the online benefits walkthrough. This can be done at any time: http://uwservice.wisc.edu/ebenefits/index-new.php

☐   Link to benefits walkthrough sent to employee
Date sent: _____ / _____ / _____

Benefit information and forms can be found here:
http://www.bussvc.wisc.edu/ecbs/benefits/newemp-introduction-reg.html

☐   Benefit forms completed and submitted
Date submitted: _____ / _____ / _____

Parking

Please email SoE's Unit Transportation Coordinator if the new employee would like to apply for parking. The Unit Transportation Coordinator will add him/her to the parking application system.

☐   SoE Unit Transportation Coordinator notified via email
Date notified: _____ / _____ / _____

☐   This employee will not apply for parking.

UW-Madison parking permits are managed by UW Transportation.
For more information and directions on parking permit applications:
http://transportation.wisc.edu/parking/Permit_General_info.aspx

Orientation

Employees new to the university should register for New Employee Orientation. A valid net ID is required to register.
https://www.ohrd.wisc.edu/OHRDCatalogPortal/Default.aspx?tabid=29&CourseGroupKey=12082

☐   Employee registered for New Employee Orientation

☐   not applicable

NEW EMPLOYEE – GENERAL TASKS

WISCARD

An employee can obtain a Wiscard after he/she is entered in HRS. A Wiscard can be obtained prior to the employee's start date, as long as they are entered in HRS.
New employees should get a Wiscard as soon as possible; it is needed for other items on this list.

For more information and required documentation: http://www.wiscard.wisc.edu/

☐ Employee has a Wiscard
Date received: _____ / _____ / _____
UW ID No. (10 digits): _____

UW NetID

Account activation: https://kb.wisc.edu/ams/page.php?id=1140
Need Wiscard with ID # to request NetID, unless you request early activation.
For early activation, contact divisional HR representative.
New employees should get a UW NetID as soon as possible; it is needed for other items on this list.

☐ Employee has a UW NetID
Date received: _____ / _____ / _____
Employee NetID:

SoE Office Assignment

Complete the SoE New Employee – Facilities Intake Form Link here pending publication of form online

☐ SoE New Employee Facilities Intake Form submitted
Date Submitted: _____ / _____ / _____

Key and Card Access

Key and card access management is delegated to SoE Local Access Key Controllers. See SoE's Key Control Policy for details: link here – pending publication of policy online

Employee must have a valid Wiscard before key card access can be granted.
(see Wiscard section above)

The employee's supervisor must submit a SoE Access Key Request:
http://businessoffice.education.wisc.edu/bo/building-services/building-access-request

☐ SoE Access Key Request form submitted
Date submitted: ____ / _____ / _____

☐ Keys and/or card access issued to employee
Date: ____ / _____ / _____

Master Level Keys

For employees requiring master level keys, please SoE's Key Control Policy for details link here pending publication of policy online

Master key requests must be submitted by Department Chairs or Unit Directors to the SoE Access Key Controller via the SoE Master Key Request Form. [**Link…]
Each master key ordered must be assigned to an employee and that assignee must pick up the master key(s) in person at the UW Locksmith Shop. A valid Wiscard is needed for pick up.

☐ SoE Master Key Request Form submitted
Date Submitted: ____ / _____ / _____

Phone

Phone service is managed by DoIT.
DoIT Voice Services Information: http://www.doit.wisc.edu/telephone/centrex/

New employee phone information
☐ This employee will have an assigned phone line
Phone number: _____
Phone jack number: _____

☐ This employee will not have an assigned phone line

☐ This employee will have a UW-owned mobile phone
UW-owned Mobile Number: _____
UW-owned Mobile Make/Model: _____

☐ This employee will not have a UW-owned mobile phone

Voicemail

Voicemail is managed by DoIT.
DoIT Voicemail Information: http://www.doit.wisc.edu/telephone/voice_mail/

☐ This employee has voicemail enabled on his/her UW phone line
☐ This employee does not have voicemail enabled on his/her UW phone line

Phone Line Management

If the employee needs to manage phone lines and/or phone bills for the department, a Telecommunication Authorization Form must be filled out and sent to the Associate Dean for Administration for approval. The Associate Dean for Administration will sign the request and send it to DoIT. http://www.doit.wisc.edu/telephone/TAR_auth.pdf

☐ TAR submitted to Associate Dean for Administration
Date submitted: _____ / _____ / _____

☐ TAR approved and submitted to DoIT
Date submitted: _____ / _____ / _____

☐ This employee will not manage phone lines or reports for the department

Equipment

This is a reminder to organize any departmental equipment for a new employee. (i.e. - laptops, cell phone, camera, etc.)

Equipment Details:

Equipment Transfer

This item is for an employee who is transferring equipment to UW from another institution.

Items valued at $5000 or more must be reported and inventoried with UW Property Control. Use the Property Transaction Form:
http://www.bussvc.wisc.edu/acct/propcont/proptran.html

☐   Property Transaction Form completed and submitted
Date submitted: _____ / _____ / _____

☐   not applicable

Items valued at less than $5000 can be recorded in departmental inventory, but do not need to be reported to UW Property Control.

☐   Items recorded in departmental inventory
Date recorded: _____ / _____ / _____

☐   not applicable

Departmental Signage

Changing office or room signs is a departmental responsibility. Signs should conform to building standards. Departments should contact the SoE Director of Facilities, Planning, & Management if there are any questions about sign standards or procedures.

Signs needing changes:

☐   Sign changes ordered
Date ordered:

☐   New signs in place
Date ordered:

Information Technology

Complete the SoE New Employee - IT Intake Form [Link here pending publication of this form online]

☐   IT Intake Form completed and submitted
Date submitted: _____ / _____ / _____

SOE HR & PAYROLL

Security Authorization - Campus IT Systems

Departments must fill out these forms for new employees to access these campus systems.

     ISIS: http://www.doit.wisc.edu/restricted/authorization/forms/isis_auth.pdf

- ☐   ISIS authorization form submitted
  Date submitted: _____ / _____ / _____
- ☐   not applicable

     HRS: http://businessoffice.education.wisc.edu/bo/hr-payroll-benefits/forms/security-request-form

- ☐   HRS authorization form submitted
  Date submitted: _____ / _____ / _____
- ☐   not applicable

     JEMS: https://uwservice.wisc.edu/docs/forms/jems-authorization-apo.pdf

- ☐   JEMS authorization form submitted
  Date submitted: _____ / _____ / _____
- ☐   not applicable

HRS Supervisor – Classified Staff Only

This is the person who will supervise the employee and approve his/her timesheets.
Complete the HRS Supervisor Add/Change Form online:
http://businessoffice.education.wisc.edu/bo/hr-payroll-benefits/forms/supervisor-add-change
SoE Business Office assigns supervisor based on that form.

- ☐   HRS Supervisor Add/Change Form submitted
  Date submitted: _____ / _____ / _____

  This employee's HRS Supervisor is: _____
- ☐   not applicable

Tuition Reimbursement Request – Unclassified Staff

Tuition reimbursement requires prior approval from employee's supervisor, department chair/director, division dean/director, and APO.

Unclassified: http://www.ohr.wisc.edu/forms/tuit624.pdf

☐ Tuition reimbursement form approved by supervisor and submitted to department chair/director

Date submitted: _____ / _____ / _____

☐ Tuition reimbursement form approved by department chair/director and submitted to Assistant Dean for HR

Date submitted: _____ / _____ / _____

☐ Tuition reimbursement form approved by Assistant Dean for HR and submitted to APO

Date submitted: _____ / _____ / _____

☐ Tuition reimbursement approved by APO

Date approved: _____ / _____ / _____

Authorized amount: _____

Notes: _____

☐ not applicable

Tuition Reimbursement Request – Classified Staff

Tuition reimbursement requires prior approval from employee's supervisor, department chair/director, division dean/director, and Classified HR.

Classified: http://www.ohr.wisc.edu/Forms/requestforreimbursement.pdf

☒ Tuition reimbursement form approved by supervisor and submitted to department chair/director
Date submitted: _____ / _____ / _____

☐ Tuition reimbursement form approved by department chair/director and submitted to Assistant Dean for HR
Date submitted: _____ / _____ / _____

☐ Tuition reimbursement form approved by Assistant Dean for HR and submitted to Classified HR
Date submitted: _____ / _____ / _____

☐ Tuition reimbursement approved by Classified HR
Date approved: _____ / _____ / _____
Authorized amount: _____
Notes: _____

☐ not applicable

Campus Training Opportunities

See the UW Office of Human Resources website for upcoming training opportunities:
https://www.ohrd.wisc.edu/home/

Campus Directory (Searchable wisc.edu)

Employee information appears in the campus directory automatically after SoE Business Office enters the employee in HRS.

Changes to personal directory information can be made by the employee in MyUW. (Work Record - Personal Information)

☐ Employee has checked the wisc.edu directory to verify that the information is accurate

Changes to appointment related information in the directory must be changed by the SoE HR Rep. Please contact your SoE HR Rep to make changes to work address, work email, or work phone as listed in the wisc.edu directory.

Transcript Printing

If the new employee will need to print transcripts, he/she will need ISIS authorization.

ISIS: http://www.doit.wisc.edu/restricted/authorization/forms/isis_auth.pdf

**NOTE: Be sure to list the printer IP address on this form to allow for transcript printing. Consult with your primary IT consultant if you have questions about this.

- ☐   ISIS authorization submitted
  Date submitted: _____ / _____ / _____

- ☐   not applicable

WiscList Information

The SoE Business Office will assign new employees to school-wide WiscLists based on appointment type.

The list below is for department/unit reference only to ensure that new employees are added to locally controlled WiscLists.

List	Added	Date
_____	☐	_____ / _____ / _____
_____	☑	_____ / _____ / _____
_____	☑	_____ / _____ / _____
_____	☐	_____ / _____ / _____
_____	☐	_____ / _____ / _____
_____	☐	_____ / _____ / _____
_____	☐	_____ / _____ / _____

SOE FINANCIALS

P-Card Holder

Here is the link to apply for a p-card for new employees: https://wneta.bussvc.wisc.edu/CardApp/CHApply.aspx

- ☐   P-Card application submitted
  Date submitted: _____ / _____ / _____

- ☐   This employee does not have a P-card

SOE FINANCIALS – cont.

P-Card Site Manager

When a new employee needs to be the site manager they need to complete the site manager form located at the bottom of this website:
http://www.bussvc.wisc.edu/acct/purchcd/siteman.html

☐ P-Card Site Manager application submitted
Date submitted: _____ / _____ / _____

☐ This employee is not a P-Card Site Manager

MDS Authorization

This is for an employee that will serve as the primary MDS account contact or primary MDS financial contact for the department's MDS account.

To create a MDS new account or make changes to an existing one, use this form:
http://www.bussvc.wisc.edu/mds/links/AcctForm.pdf

☐ MDS form submitted
Date submitted: _____ / _____ / _____

☐ This employee will not have MDS authorization

Grant Transfers

This item is for new employees that are PI's on grants administered by SoE (including WCER).

☐ This employee is a PI on grants that will be administered by SoE
Please follow up with the Assistant Dean for Grants & Contracts with details regarding these grants.

☐ This employee is not a PI