



# Onboarding Checklist

This checklist is intended to be a helpful tool to assist with the general tasks of hiring an employee.

## General

- Do I have all of the appropriate paperwork? See the New Hire Processing Checklist: <https://www.hr.upenn.edu/docs/default-source/forms/new-hire-checklist.pdf?sfvrsn=6>
- Are they a Foreign National? See Non-Resident Alien Flowchart: [http://www.finance.upenn.edu/ftd/Documentation/NRA\\_Flowchart.pdf](http://www.finance.upenn.edu/ftd/Documentation/NRA_Flowchart.pdf)
- Has a School/Center specific orientation been scheduled?
- Has the new hire been enrolled in a 'New to Penn' orientation session?
- Has the employee been set up in PennWorks?
  - Bio/Role/Distribution entered? Emergency Contact included?
  - Direct Deposit established?
  - PTO set up?
- Has a Penn ID been issued?
- Has a PennKey and Password been established?
- Has their Penn Directory (Person and Organization) and UPennAlert information been added?
- What training will be required?
- Has the Penn Profiler survey in Knowledge Link been reviewed with the new employee? Supervisor identified?
- Do any University organizations or third parties need to be contacted? Senior BA, ABA, ADP, etc.
- Has the link to Penn policies been shared? <http://www.upenn.edu/services/policies.php>
- Has the TEM default reviewer and default cost object funding been established for the employee?

## Penn Property Required

- |  |  |
|--|--|
| <input type="checkbox"/> PennCard  | <input type="checkbox"/> Computers, home and/or office               |
| <input type="checkbox"/> Keys for buildings, suite, office, lab, desk, cabinets, equipment, vehicles, etc. | <input type="checkbox"/> Penn licensed software                      |
| <input type="checkbox"/> Building access – accessibility accommodations                                    | <input type="checkbox"/> Phones, Tablets, iPads, etc.                |
| <input type="checkbox"/> Corporate Credit Cards, Purchasing, Fleet, Event, Travel, TAC, etc.               | <input type="checkbox"/> Books, journals and other office literature |
| <input type="checkbox"/> Equipment, furnishings, supplies, etc.  | <input type="checkbox"/> Business purpose Tokens                     |
|  | <input type="checkbox"/> Uniforms                                    |
|  | <input type="checkbox"/> Other _____                                 |

## Penn Access Required

- Has a Penn e-mail account been set up?
- What systems will they need access? SRFS Systems, PennERA, BEN Financials, PennWorks, ATLAS, etc.
- Will they be in an approver role? i.e., Access Administrator, PennWorks approver, PO Manager default approver?
- What computer software will need to be added to their computer?
- Does the employee need to be added to any listserves?

## Other

- Has the employee contacted the following areas, if applicable:
  - Penn Benefits Center (888-736-6236) re: Medical, Dental, Vision and Life Insurance
  - Retirement Benefits (877-736-6738)
  - Human Resources for Tuition Benefits (215-898-7281)
  - Parking Services (215-898-8667)

\* For Penn Faculty...

- Do they have any grants? If so, are they proposing to transfer the grant?