

PeopleAdmin Quick Reference Guide
Onboarding Checklists Matrix

The onboarding process includes a range of tasks for the new employee to complete such as providing required critical employment data, reviewing key university policies, enrolling in state insurance and retirement benefits, and completing necessary federal forms.

This matrix describes the tasks included in each checklist. To learn which checklist(s) to assign to new hires or rehires (greater than 1 year) by position type, please refer to the [New Hire and Rehire – Greater Than 1 Year Matrix](#). HR Operations and Services will assign the appropriate task(s) to rehires (less than 1 year) and employees with promotions, reassignments and demotions. For details, refer to [Rehire – Less Than 1 Year & Other Action Matrix](#).

IMPORTANT: International Support for Faculty and Staff (ISFS) will create the onboarding event for new international hires and rehires (greater than 1 year) hired at USC Columbia. ISFS will also assign the appropriate task(s) to international rehires (less than 1 year) and international employees with promotions, reassignments and demotions.

**USC Columbia HR Contacts – Do not create the onboarding event for international new hires or rehires, in general.*

Critical New Hire Tasks Checklists

There are three (3) critical new hire checklists; however, only one (1) is assigned to a new hire, per below.

1. Critical New Hire Tasks Checklist

- Assigned to **all new** employees, **except internationals**.

Task	Description
I-9 Form	This form must be completed on or before the employee’s effective date of hire. Once the employee completes Section 1, it will automatically flow to a group of designated I-9/E-Verify authorized representatives for the college or division, and it will appear as a task. Once Section 2 is completed by one of the representatives in the group, the task will disappear from everyone’s task list.
Employee Information Verification	This form will collect personal data, including but not limited to, SSN, date of birth, and state retiree status (that the applicant cannot provide in the applicant tracking system). This form will also verify information such as address and education.
Equal Opportunity Self-Identification Forms	Information on these forms is requested due to federal and state equal opportunity employment laws and reporting.
W-4 Withholding	This completed form will workflow to the Payroll Department for input into the payroll system. If no response is received for federal withholdings, defaults may be set accordingly.

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2. Columbia International Critical Checklist

- **Assigned by ISFS to USC Columbia international new hires** only.

Task	Description
I-9 Form	This form must be completed on or before the employee's effective date of hire. Once the employee completes Section 1, it will automatically flow to a group of designated I-9/E-Verify authorized representatives in the International Support for Faculty and Staff Office (ISFS) and appear as a task. Once Section 2 is completed by one of the representatives in the group, the task will disappear from everyone's task list.
Employee Information Verification	This form will collect personal data, including but not limited to, SSN, date of birth, and state retiree status (that the applicant cannot provide in the applicant tracking system). This form will also verify information such as address and education.
Equal Opportunity Self-Identification Forms	Information on these forms is requested due to federal and state equal opportunity employment laws and reporting.
Foreign National Tax Information Form	The International Payroll Team helps ensure the appropriate U.S. and state income tax withholding rates and social security tax withholding rates are applied correctly to wages paid to non-U.S. citizens or legal permanent residents. The employees subject to this tax review include F-1, J-1 and H1-B visa holders, as well as others who are present in the U.S. on a temporary visa. To properly evaluate whether an international employee is eligible for tax treaty benefits, a Foreign National Tax Information Form must be completed and returned to the Payroll Department prior to employment beginning, or as soon as possible thereafter.
IS-1 Approval	ISFS task only.
Benefits: Insurance Information	To review the benefits package and prepare for a meeting with a benefits counselor, if eligible. This task does not include an option to upload enrollment form(s).
Parking Registration	USC Columbia requires a parking permit for anyone using USC garages and lots. Learn about rates for various permits on campus. Metered and hourly parking may also be available, with no permit required.
Carolina Card	USC Columbia issues a Carolina Card for all faculty and staff employees.
Carolina Alert	USC Columbia has a campus wide alert system. Provide contact information for USC to use if there is a campus emergency.
University Orientation	Register for a new employee orientation to learn about the university, and tour the USC Columbia campus.

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3. Campus International Critical New Hire Tasks

- Assigned by HR Contacts at **USC Aiken, USC Beaufort, USC Upstate** and **Palmetto College to international new hires** only.

Task	Description
I-9 Form	This form must be completed on or before the employee’s effective date of hire. Once the employee completes Section 1, it will automatically flow to a group of designated I-9/E-Verify authorized representatives for the college or division and appear as a task. Once Section 2 is completed by one of the representatives in the group, the task will disappear from everyone’s task list.
Employee Information Verification	This form will collect personal data, including but not limited to, SSN, date of birth, and state retiree status (that the applicant cannot provide in the applicant tracking system). This form will also verify information such as address and education.
Equal Opportunity Self-Identification Forms	Information on these forms is requested due to federal and state equal opportunity employment laws and reporting.
Foreign National Tax Information Form	The International Payroll Team helps ensure the appropriate U.S. and state income tax withholding rates and social security tax withholding rates are applied correctly to wages paid to non-U.S. citizens or legal permanent residents. The employees subject to this tax review include F-1, J-1 and H1-B visa holders, as well as others who are present in the U.S. on a temporary visa. To properly evaluate whether an international employee is eligible for tax treaty benefits, a Foreign National Tax Information Form must be completed and returned to the Payroll Department prior to employment beginning, or as soon as possible thereafter.
IS-1 Approval	ISFS task only.

Campus Specific Checklists

At this time, there is only one (1) campus specific checklist to select, which is for USC Columbia. In the future we will work toward also offering other campus specific checklists.

❖ **Columbia Campus New Hire Tasks**

- Assigned to all USC Columbia employees, except internationals. For internationals, the tasks are incorporated into the Columbia International Critical Checklist.

Parking Registration	USC Columbia requires a parking permit for anyone using USC garages and/or lots. Learn about rates for various permits on campus. Metered and hourly parking may also be available, with no permit required.
Carolina Card	USC Columbia issues a Carolina Card for all faculty and staff employees.
Carolina Alert	USC Columbia has a campus wide alert system. Provide contact information for USC to use if there is a campus emergency.



Human Resources

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University Orientation	Register for a new employee orientation to learn about the university, and tour the USC Columbia campus.
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Position Specific Checklists

There are five (5) position specific checklists. Only one (1) is assigned to a new hire or rehire (greater than 1 year), based on their position at USC.

1. Adjunct Faculty New Hire Tasks

Technology Use Agreement	All faculty and staff must read policies related to technology access and attest to user responsibility.
UofSC Policies	To familiarize new employees with university policies.
ACA Acknowledgement	To comply with the Affordable Care Act (ACA), review the ACA Marketplace Notice before electronically signing this form to acknowledge receipt.
VIP Tasks	To complete emergency contacts and establish direct deposit, which is mandatory for all university employees.
Benefits: State Retirement	To review and plan to select a state retirement plan within 30 calendar days of hire. An email from S.C. Public Employee Benefits Authority (SC PEBA) will be sent to the employee to enroll electronically.
Benefits: SC Deferred Compensation Program (SCDCP) Review	To review the South Carolina Deferred Compensation Program (SCDCP) which is a voluntary retirement program, and learn how to save for retirement.
Security Awareness Training	Video based training to learn about protecting our organization from cybersecurity threats.

2. Faculty FTE New Hire Tasks

Technology Use Agreement	All faculty and staff must read policies related to technology access and attest to user responsibility.
Benefits: Insurance Information and Enrollment	To review and upload the Carolina Rewards Orientation Worksheet (CROW), and other applicable health insurance enrollment forms within 30 calendar days of hire. Upon receipt, the employee's benefits administrator will process their elections with SC PEBA. At that time, the employee will receive an email from SC PEBA to access MyBenefits and review/approve their state insurance elections.
Benefits: State Retirement	To review and plan to select a state retirement plan within 30 calendar days of hire. Employees will receive an email from SC PEBA to enroll electronically.
Benefits: SC Deferred Compensation Program (SCDCP) Review	To review the South Carolina Deferred Compensation Program (SCDCP) which is a voluntary retirement program, and learn how to save for retirement.

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UofSC Policies	To familiarize new employees with university policies.
ACA Acknowledgement	To comply with the Affordable Care Act (ACA), review the ACA Marketplace Notice before electronically signing this form to acknowledge receipt.
VIP Tasks	To complete emergency contacts and establish direct deposit, which is mandatory for all university employees.
Time and Attendance	To review the Training Guide for iTAMs, the main time and attendance system for the university. If your department utilizes another system, it will be reviewed with you accordingly.
Security Awareness Training	Video based training to learn about protecting our organization from cybersecurity threats.

3. RGP/TL New Hire Tasks

Technology Use Agreement	All faculty and staff must read policies related to technology access and attest to user responsibility.
Position Description Acknowledgement (if applicable)	The position description (PD) will be signed by the supervisor and will route to the employee electronically. The employee will review and sign the PD electronically for their file.
Benefits: State Retirement	To review and plan to select a state retirement plan within 30 calendar days of hire. An email from SC PEBA will be sent to the employee to enroll electronically.
UofSC Policies	To familiarize the new employee with university policies.
ACA Acknowledgement	To comply with the Affordable Care Act (ACA), review the ACA Marketplace Notice before electronically signing this form to acknowledge receipt.
VIP Tasks	To complete emergency contacts and establish direct deposit, which is mandatory for all university employees.
Benefits: SC Deferred Compensation Program (SCDCP) Review	To review the South Carolina Deferred Compensation Program (SCDCP) which is a voluntary retirement program, and learn how to save for retirement.
Time and Attendance	To review the Training Guide for iTAMs, the main time and attendance system for the university. If your department utilizes another system, it will be reviewed with you accordingly.
Security Awareness Training	Video based training to learn about protecting our organization from cybersecurity threats.

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4. Staff FTE New Hire Tasks

Technology Use Agreement	All faculty and staff must read policies related to technology access and attest to user responsibility.
Benefits: Insurance Information and Enrollment	To review and upload the Carolina Rewards Orientation Worksheet (CROW), and other applicable health insurance enrollment forms within 30 calendar days of hire. Upon receipt, the employee's benefits administrator will process their elections with SC PEBA. At that time, the employee will receive an email from SC PEBA to access MyBenefits and review/approve their state insurance elections.
Benefits: State Retirement	To review and plan to select a state retirement plan within 30 calendar days of hire. An email from SC PEBA will be sent to the employee to enroll electronically.
Benefits: SC Deferred Compensation Program (SCDCP) Review	To review the South Carolina Deferred Compensation Program (SCDCP) which is a voluntary retirement program, and learn how to save for retirement.
UofSC Policies	To familiarize new employees with university policies.
Position Description Acknowledgement (if applicable)	The position description (PD) will be signed by the supervisor and will route to the employee electronically. The employee will review and sign the PD electronically for their file.
ACA Acknowledgement	To comply with the Affordable Care Act (ACA), review the ACA Marketplace Notice before electronically signing this form to acknowledge receipt.
VIP Tasks	To complete emergency contacts and establish direct deposit, which is mandatory for all university employees.
Time and Attendance	To review the Training Guide for iTAMs, the main time and attendance system for the university. If your department utilizes another system, it will be reviewed with you accordingly.
Security Awareness Training	Video based training to learn about protecting our organization from cybersecurity threats.

5. Temporary Staff New Hire Tasks

Technology Use Agreement	All faculty and staff must read policies related to technology access and attest to user responsibility.
UofSC Policies	To familiarize new employees with university policies.
ACA Acknowledgement	To comply with the Affordable Care Act (ACA), review the ACA Marketplace Notice before electronically signing this form to acknowledge receipt.
VIP Tasks	To complete emergency contacts and establish direct deposit, which is mandatory for all university employees.

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Benefits: State Retirement	To review and plan to select a state retirement plan within 30 calendar days of hire. An email from SC PEBA will be sent to the employee to enroll electronically.
Benefits: SC Deferred Compensation Program (SCDCP) Review	To review the South Carolina Deferred Compensation Program (SCDCP) which is a voluntary retirement program, and learn how to save for retirement.
Time and Attendance	To review the Training Guide for iTAMs, the main time and attendance system for the university. If your department utilizes another system, it will be reviewed with you accordingly.
Security Awareness Training	Video based training to learn about protecting our organization from cybersecurity threats.

Benefits Checklist

The insurance benefits checklist is separate because **adjunct faculty/temporary staff** and **research grant/time-limited employees** must satisfy certain criteria to be eligible for insurance benefits. It is up to the Department or College/Division HR Contact to ensure the checklist is assigned to only those that meet eligibility requirements.

❖ Insurance Benefits

The insurance benefits checklist must be assigned*, if:

- The employee is adjunct faculty/temporary staff, or research grant/time-limited and expected to work 30 hours or more per week – eligible under the Affordable Care Act; or
- The employee is research grant/time-limited, scheduled to work at least 20 hours per week, and has grant or project funding for insurance benefits.

*Do not assign to international new hires hired at USC Columbia – there is an insurance orientation task already included in the Columbia International Critical Checklist.