



## **Applicant Tracking System's Training Onboarding Portal Guide**

Updated March 2024

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## ONBOARDING OVERVIEW

The Onboarding Portal is a new feature for new employees hired in the Applicant Tracking System. This guide will cover many aspects of the Onboarding Portal including how to navigate and assign tasks for a candidate's onboarding task list:

The screenshot displays the MSU Onboarding Portal interface. At the top, there is a navigation menu with links for 'Homepage', 'University at a Glance', 'Benefits & Retirement', 'Resources', 'Systems & Access', and 'Contact HR'. The main content area is titled 'Welcome, Derek Martin' and includes a welcome message and a brief overview of the onboarding process. On the right side, a 'Your task list' panel is visible, showing tasks categorized by 'Prior to First Day' and 'First Week'. The 'Prior to First Day' section includes 'Complete I-9 (Section 1)' (Pending hiring manager completion of task), 'Prepare for Orientation' (Completed), and 'Review University Policies' (Completed). The 'First Week' section includes 'Employee ID Card'.

This guide applies to both Support Staff and Faculty & Academic Staff and Executive Management; tasks in the Onboarding Portal are slightly different depending on the employee type. These differences are explained further in the [APPENDIX](#), along with a list of the tasks.

For consistency within MSU, we will use the term **Applicant Tracking System (ATS)** as the name of our new system for recruiting and hiring. The software being implemented is called PageUp. These terms may be used interchangeably; however, all training materials will reference the ATS.

**FOR STAFFING COORDINATORS – ACTIVATING THE PORTAL**

When creating the Offer Card/Hiring Recommendation:

1. Identify the Supervisor in the *Onboarding* section. An Onboarding Delegate 1 and Onboarding Delegate 2 may also be optionally identified.

**Note:** The Onboarding Delegate 2 will not receive email reminders regarding incomplete onboarding tasks.

 Supervisor and Onboarding Delegate users will have access to the new hire task list and are responsible for ensuring the hire and the unit complete all assigned tasks. Therefore, Supervisor and Onboarding Delegate selections should be made appropriately.

**ONBOARDING**

Supervisor:   

No user selected.

Onboarding Delegate 1:   

No user selected

Onboarding Delegate 2:   

No user selected

2. Select the appropriate Data Collection Form and Onboarding Task List from the drop-down list.

**Note:** Once the Faculty & Academic Staff candidate acknowledges their acceptance, they will be directed to a new page with a congratulations message and instructions for accessing the Onboarding Portal. This welcome page is the Data Collection Form for Faculty & Academic Staff candidates.

**Note:** Verify the correct Onboarding Task List is selected as it drives the standard list of tasks the new hire will be required to complete. The Onboarding Task List can be highly customized to meet unit and departmental onboarding needs after the selection is made.

Data Collection Form:\*  ▼

Onboarding Task List:\*  ▼

Once the Hiring Recommendation (also known as the Offer Card) is created, the following steps must occur:

**Support Staff**

1. The Hiring Recommendation is approved.
2. An online offer is made to the candidate.

3. The candidate receives an email that a formal offer has been extended and to review it in the Applicant Portal.
4. Once the candidate accepts the offer, they will be directed to the Data Collection Form. This requires the candidate to fill out a series of questions, which are used for processing the hire at MSU Human Resources (HR). The Data Collection Form also contains a welcome message and instructions for accessing the Onboarding Portal. To view a sample of what the Data Collection Form will look like, please refer to the [Appendix](#).
5. Upon submission of the form, the candidate will be automatically redirected to the Onboarding Portal.

**Note:** The candidate will not be able to access the Onboarding Portal prior to accepting the offer and submitting the Data Collection Form. The Onboarding Portal is available to the supervisor/onboarding delegates and candidates immediately after the candidate accepts their offer. Access to the Onboarding Portal is turned off 45 days after the candidate's start date.

### Faculty & Academic Staff and Executive Management

The FAS Hire Form can be completed at any point in the following process in the EBS portal. It is recommended that the hire form be started at the time the offer is accepted by the candidate. The start date of the hire dictates the due date for tasks that need to be completed in the Onboarding Portal. If there is a change in start date, please contact the HR Analyst.

1. An offer is negotiated outside of the ATS between the department and the candidate.
2. The Hiring Recommendation is created in the ATS when the final, signed offer letter is uploaded.
3. An online offer is made to the candidate.
4. The candidate will receive an email to log on to their Applicant Portal and acknowledge the acceptance of their offer in order to trigger their Onboarding Portal.
5. Once the candidate acknowledges their acceptance, they will be directed to the Data Collection Form, which is the Acknowledgement of Acceptance of Offer welcome page. While this form does not collect information from the new hire, it is required in order for the candidate to gain access to the Onboarding Portal. Hiring information continues to be collected through the Appointment Form in EBS. To view a sample of what this page will look like, please refer to the [Appendix](#).
6. Following submission of this page, the candidate will be automatically redirected to the Onboarding Portal.

**Note:** The candidate will not be able to access the Onboarding Portal prior to acknowledging acceptance of the offer and clicking 'Submit' on the welcome page.

 You should not change the application status to *Offer accepted*. The hire must acknowledge their acceptance through their Applicant Portal to initiate their Onboarding Portal.

To view the complete the Hiring Recommendation process, see the [Staffing Coordinator Guide for Support Staff Positions](#) or the [Staffing Coordinator Guide for Faculty & Academic Staff/Executive Management Positions](#).

**Note:** The Staffing Coordinators, Supervisor and HR Analyst listed on the Hiring Recommendation will receive an email when the applicant accepts or declines the offer.

## ACCESSING THE ONBOARDING PORTAL

### Applicant Tracking System Access

1. Login to the EBS Portal.
2. Select the Enterprise Business Systems link.
3. Click on the Applicant Tracking System tile.

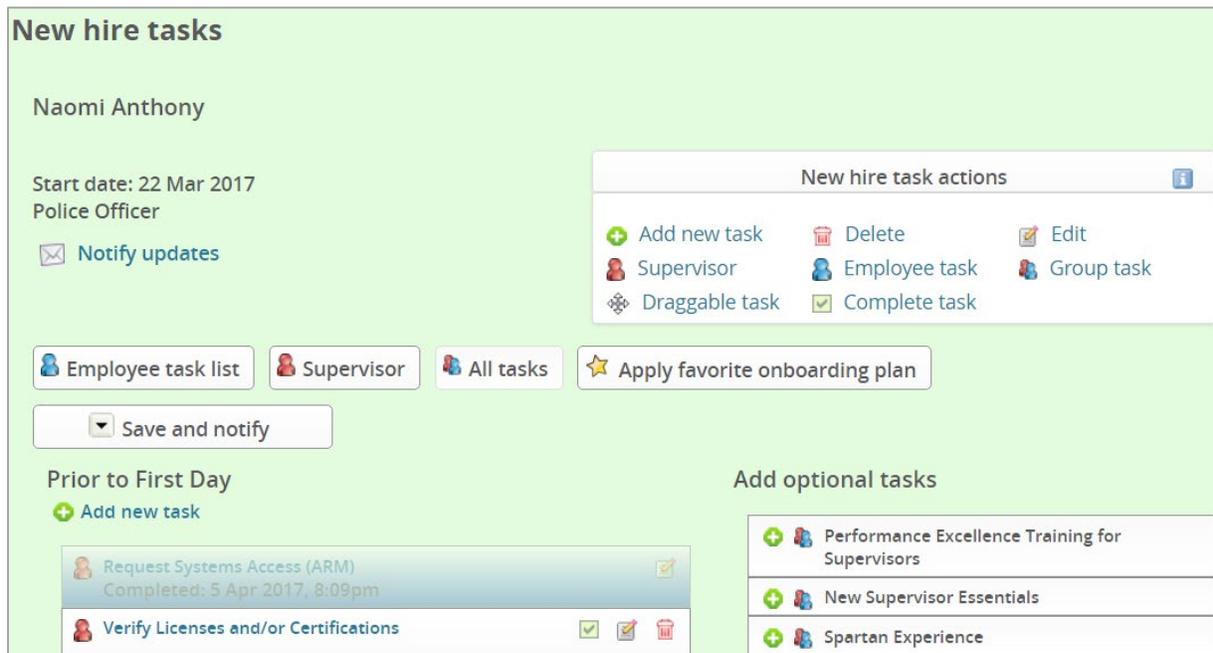
**Note:** Be sure to 'Allow pop-ups' for the ATS.

### Applicant Tracking System Dashboard

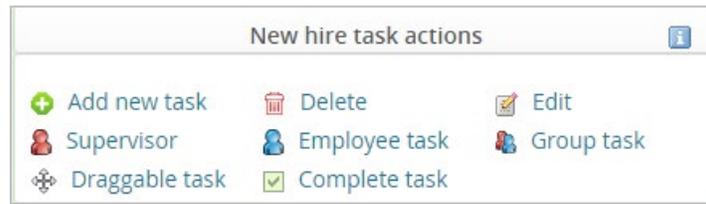
1. Supervisors and onboarding delegates can access onboarding tasks through the *dashboard*.
2. Click the **new hires** link next to the Offers bubble.
3. The *My new hires* screen displays a list of all new hires.
4. Find the candidate to onboard and click **View all tasks**.
5. A pop-up screen will appear upon entering the *New hire tasks* screen. This screen provides an overview of the portal and the functionality of various sections and buttons. To hide this screen, check the **Do not show this again** box and **Continue**.

## NAVIGATING THE ONBOARDING DASHBOARD

The *New hire tasks* screen displays.



A legend on the right of the screen identifies icons for managing the onboarding task list.



Tasks assigned to both the supervisor and employee will be marked with a red and blue person icon

Tasks assigned only to the employee will be marked with a blue person icon

Tasks assigned only to the supervisor will be marked by a red person icon

**Note:** Only the person(s) assigned to a task can mark it as complete. If assigned to both the employee and supervisor, both must mark it as complete to remove it from the list.

A task that is completed will be highlighted blue and timestamped with the date and time completed.



Tasks with a due date will have the date listed underneath the task name.



A task that is overdue will be highlighted red.

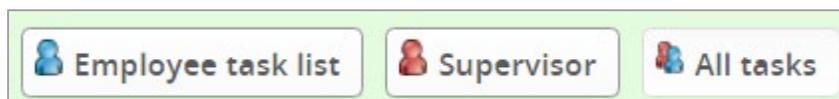


To add or change a due date, click on the pencil icon within the task. Select a date and click **Save**.

**Note:** Due dates should not be changed for any of the standardized onboarding tasks as they are automatically calculated based on the employee's start date (e.g., Complete I-9 (Section 1), Complete I-9 (Section 2), Sign up for benefits.)

**Filtering Tasks**

By default, all tasks assigned to both the employee and the supervisor will be displayed. To see the tasks assigned to one of these groups, click either the **Employee task list** or **Supervisor task list** button.



## Task Groups

All of the tasks in the Onboarding Portal are grouped into three sections:

- Prior to First Day
- First Week
- First 30 Days

The new hire's task list will also be organized by task group, which helps them to prioritize which tasks to complete first.

## MARKING A TASK AS COMPLETE

To mark a task as complete:

1. Open the task by clicking on the name of the task or the checkbox .
2. Click **Mark as completed**.

**Complete I-9 (Section 2)**

Step due: 25 Mar 2017

You must complete Section 2 of the I-9 within 3 days of the employee's start date (22 Mar 2017). Failure to do so will result in fines.

[Complete Section 2 of the I-9 HERE.](#)

[View instructions for completing Section 2 of the I-9 HERE.](#)

Mark as completed
Close

Once the task is marked as complete, it will be highlighted blue and stamped with the date and time it was completed.



**Note:** Once a task is marked as complete, it cannot be reversed. A duplicate task would need to be created.

## MODIFYING TASKS

Tasks can be edited and added/deleted throughout the onboarding process, which is covered in the [Adding Tasks](#) section.

To modify a task:

1. Click on the pencil icon 
2. The *Edit task* window will open. There is the option to edit the:
  - a) Title
  - b) Task group (Prior to first day, First week, First 30 days)
  - c) Due date and time
  - d) Content
 

**Note:** Use the Tools dropdown menu to insert a link, document or image to the task.

 The Complete I-9 (Section 1) task must be edited to insert location code.
  - e) Who the task is allocated to (Employee, Employee and Supervisor).
3. To add the edited task to the list of Favorite Tasks, check **Add to favorites**.
4. Click **Save**.

Title:

Group:  ▼

Date:   Time:

Content: Merge fields

**B I**         ▼

In order to complete the hiring process for your new position, please complete an electronic I-9 form (Section 1) and sign it with an electronic signature on or before your first scheduled day of work. If you are attending orientation prior to your first day of work, please complete section 1 prior to orientation.

NOTE: Section 1 of the I-9 cannot be completed more than six months prior to your start date ({{EMPLOYEESTARTDATE}})

[To complete Section 1 of the electronic I-9 click HERE](#), and select "Click here to access MSU's online I-9 system".

- The Employer Code for Michigan State University is 16628
- **The Location Code must be obtained from your supervisor or HR contact.**
- Your employment date is: (EMPLOYEESTARTDATE)

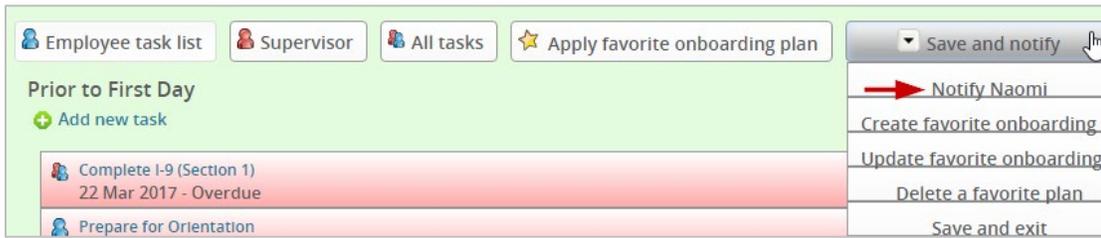
Activity type:

Task allocated to:

Add to favorites

To notify the new hire when a task has been edited or added/deleted:

1. Select **Notify Employee** from the *Save and notify* drop-down menu.



2. The *Email employee* screen will display. The supervisor's name will populate in the signature line; however, this can be edited. Edit the email language as necessary, but be sure not to remove the link to the Applicant Portal, as this is how the new hire accesses the Onboarding Portal.
3. Click **Send**.

Email employee

From:\*

Subject:\*

Message: Merge fields

**B I** Tools



Dear Rachel,

Updates have been made to your onboarding task list. [Please login to your Applicant Portal HERE](#), to review these updates.

Regards,

Dana Grimm  
Michigan State University

**Note:** The hire can also be notified of updates to the Onboarding Portal by clicking on **Notify updates** in the upper left corner of the page.

**New hire tasks**

Naomi Anthony

Start date: 22 Mar 2017  
Police Officer

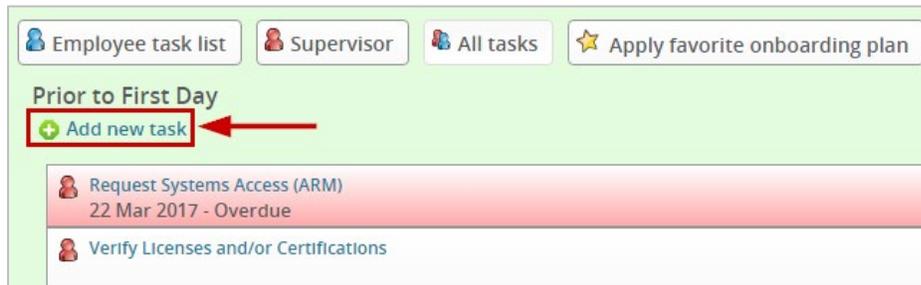
[Notify updates](#)

## ADDING TASKS

There are three options for adding a task:

- Create a task
- Add an optional task
- Add a favorite task

To create a new task, click the **Add new task** link under one of the three task groups. A green plus sign  appears to the left of this link.



To add an optional task, click on the green plus sign  next to the desired task from the *Add optional tasks* list.

**Note:** The optional task list is available to all users and includes tasks that may be applicable to some hires and not others. Optional tasks are pre-determined by central offices. Supervisors and onboarding delegates cannot add tasks to the optional task list.



To add a favorite task, click on the green plus sign  next to the desired task in the *My Favorite Tasks* list.

**Note:** The favorites task list is created and managed by each individual user. Favorite tasks are not shared between the supervisor and onboarding delegates. If no favorite tasks have been created by the user, there will be no options to select from this list. Tasks can be added as favorites when creating or editing a task by checking the box next to **Add to favorites**.



1. The *New task* screen displays.
  - a) Enter the Title of the task.
  - b) Select the appropriate section (Prior to First Day, First Week, or First 30 Days) from the Group drop-down menu.
  - c) Select a Date when the task is due. A specific time may also optionally be defined.
  - d) Enter additional instructions under Content.
    - Merge fields can be utilize in this section by pulling information from the system such as job title, working title, employee start date, etc.
    - Links to external sites may also be included with directions on where the new hire should go to complete the task.
    - Use the Tools dropdown menu to add an image or document.
  - e) Assign the task by selecting the appropriate option from the task allocated to drop-down menu. Options will include the employee, the supervisor or both.

To save this task for later use, check **Add to favorites**. If this box is checked, the task will appear under the *My Favorite Tasks* menu on the right side of the dashboard.

New task

Title:

Group:

Date:   Time: -- -- --

Content: Merge fields

**B I** [List icons] [Tools]

This is where you would describe the task|

Activity type:

Task allocated to:

Add to favorites:

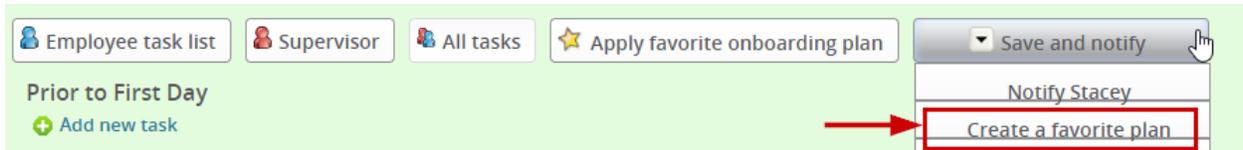
**Note:** Employees can only see tasks that have been assigned to them. Supervisors and onboarding delegates can see employee tasks and supervisor tasks.

**Note:** Once a task is added to the list, it can be reordered or moved to another task group by clicking and dragging (at go-live, the system was experiencing difficulties with this feature).

## CREATING A FAVORITE ONBOARDING PLAN

Once the onboarding Task List has been modified to meet the user's needs, the user can save the onboarding plan as a favorite so that it can be used for a future new hire. To create a favorite onboarding plan:

1. Click the *Save and notify* drop-down menu and select **Create favorite onboarding plan**. The *Create favorite onboarding plan* screen will display.



2. Enter a Favorite plan name and click **Save**.

### Create a favorite plan

Favorite plan name:

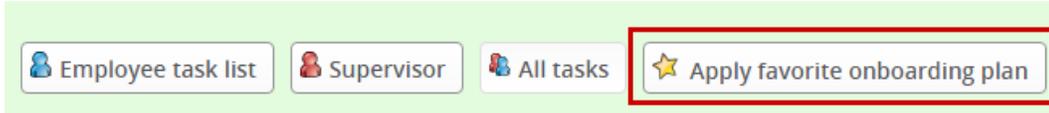
**Note:** Once a favorite onboarding plan has been created, it can be further edited or deleted from the *Save and notify* drop-down menu.

## APPLYING A FAVORITE ONBOARDING PLAN

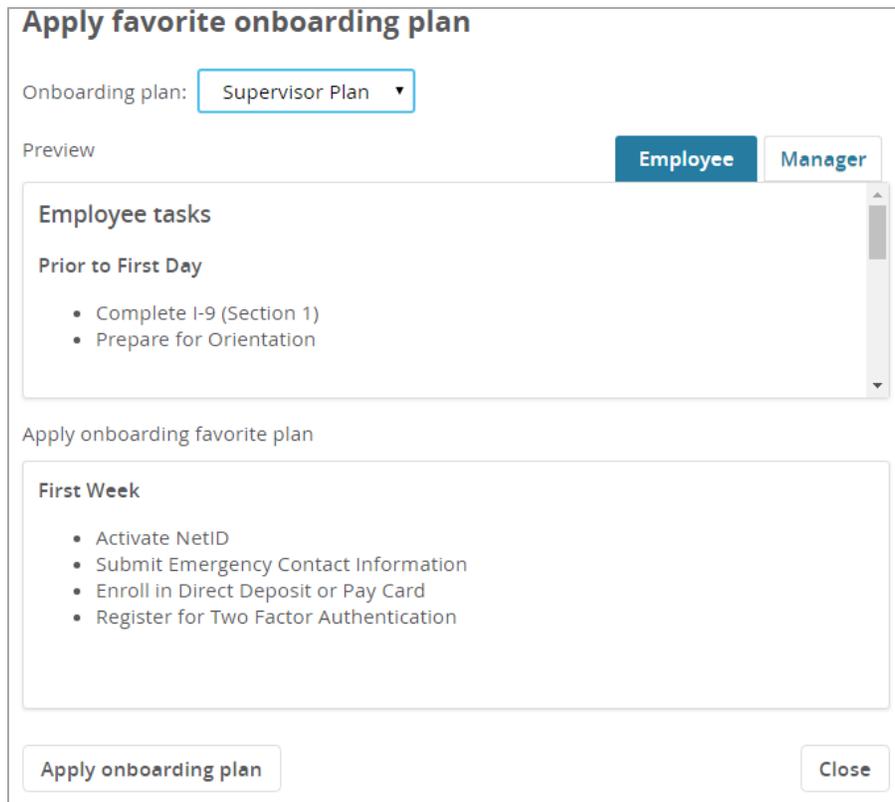
Once a favorite onboarding plan is created and saved, it can be utilized for other new hires.

**Note:** Applying a favorite onboarding plan will reset any onboarding tasks marked as completed. As such, it is best to apply a favorite onboarding as plan as soon as possible and refrain from applying to any plans that are already in-progress.

1. To apply a favorite onboarding plan, click **Apply favorite onboarding plan**.



2. The *Apply favorite onboarding plan* screen will display. Select the name of the appropriate onboarding plan to apply from the Onboarding plan drop-down menu. The selected onboarding plan will display under Preview. Tabs to the right of the screen allow the supervisor or onboarding delegate to preview the tasks that are assigned to the employee and the tasks that are assigned to the manager. To apply the plan, click **Apply onboarding plan**.



## TASK REMINDERS

Some standard tasks in the Onboarding Portal will trigger automatic email reminders if the due date is approaching and the task has not been marked as complete. The table below lists which tasks will trigger email reminders if the task has not been marked complete by the 'Email reminder sent' date. It also notes who will receive the email notification for that task.

**Note:** The system will consolidate all reminders for the day into one email.

Task	Email reminder sent	Email Recipient(s)
Prepare for Welcome Session	4 days prior to start date	New Hire
Complete I-9 (Section 1)	3 days prior to start date	New Hire Supervisor Onboarding Delegate 1
Request Systems Access	2 days prior to start date	Supervisor Onboarding Delegate 1
Review University Policies (Support Staff)	3 days prior to start date	New Hire
Financial Conflict of Interest (Faculty and Academic Staff)	5 days prior to start date	New Hire
Complete I-9 (Section 2)	1 day after start date	Supervisor Onboarding Delegate 1
Complete your Personal Profile in EBS (Faculty and Academic Staff)	5 days after start date	New hire
Enroll in Direct Deposit or Pay Card	7 days after start date	New Hire
Performance Excellence Training for Employees (Support Staff)	9 days after start date	New Hire
Performance Planning Session (Support Staff)	23 days after start date	Supervisor Onboarding Delegate
Relationship Violence & Sexual Misconduct Training	20 days after start date	New Hire Supervisor Onboarding Delegate

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<b>Task</b>	<b>Email reminder sent</b>	<b>Email Recipient(s)</b>
Sign Up for Benefits	23 days after start date	New Hire Supervisor Onboarding Delegate

## APPENDIX

### Support Staff Data Collection Form

Support Staff - New Hire

Saved

Support Staff New Hire Data Collection



Congratulations on your new position and welcome to Michigan State University!

The following data collection form will be used to create your employee record. Please complete at your earliest possible convenience.

► Social Security Number will be used to create an accurate employer record and ensure tax forms are prepared correctly. If you do not have a Social Security Number, please contact MSU HR Solutions Center at 517-353-4434 or 800-353-4434.

Social Security Number (SSN)  
*(Format: XXX-XX-XXXX)*

► Enter name exactly as it appears on Social Security Card.

First Name

Middle Name

(optional)

Last Name

Preferred Name

(optional)

Date of Birth

Do you have a current recorded Personal Protection Order or other current legal document that would require MSU to suppress your identity?

Yes No

Will you be working with any relatives in your new department?

Yes No

Please provide the name of your relative:

First Name Middle Name (optional) Last Name

✓ EEO Voluntary Applicant Data Information ▼

Why are you being asked to provide your race/ethnicity and gender?

Because at MSU, we are committed to reaching out to, hiring, and providing equal opportunity to minorities and women. To help us measure how well we are doing, applicants are invited to report their demographic information. In extending this invitation you are also advised that: (a) you are under no obligation to respond; (b) responses will remain confidential within the Human Resources Department; and (c) responses will be used only for the necessary information to include in our Affirmative Action Program. MSU is a university whose core value is inclusion - we value and respect diversity.

GENDER:

Male Female (optional)

CITIZENSHIP:

- Citizen
Non-Resident Alien
Non-Citizen Nat'l of U.S.
Permanent Resident (optional)

ETHNICITY IDENTIFICATION:

- Hispanic or Latino Origin: A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture regardless of race.
Not of Hispanic or Latino Origin
I choose not to disclose (optional)

EEOC RACE IDENTIFICATION CATEGORIES (Please identify one or more)

- White: A person having origins in any of the original peoples of Europe the Middle East or North Africa.
Black or African American: A person having origins in any of the black racial groups of Africa.
Native Hawaiian or Other Pacific Islander: A person having origins in any of the peoples of Hawaii Guam Samoa or other Pacific Islands.
Asian: A person having origins in any of the original peoples of the Far East Southeast Asia or the Indian Subcontinent including for example Cambodia China India Japan Korea Malaysia Pakistan the Philippine Islands Thailand and Vietnam.
American Indian or Alaska Native: A person having origins in any of the original peoples of North and South America (including Central America) and who maintain tribal affiliation or community attachment.
I choose not to disclose (optional)

✓ Veteran Status Self Identification

**How do I know if I am a Protected Veteran?**

Michigan State University is a Government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 U.S.C. 4212 (VEVRAA), which requires Government contractors to take affirmative action to employ and advance in employment:

- (1) disabled veterans;
- (2) recently separated veterans;
- (3) active duty wartime or campaign badge veterans; and
- (4) Armed Forces service medal veterans.

Classification definitions:

- A "disabled veteran" is one of the following:
  - a veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs; or
  - a person who was discharged or released from active duty because of a service-connected disability.
- A "recently separated veteran" means any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty in the U.S. military, ground, naval, or air service.
- An "active duty wartime or campaign badge veteran" means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.
- An "Armed forces service medal veteran" means a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

**Why are you being asked to complete this form?**

At Michigan State University, we are committed to recruiting, hiring and retaining qualified veterans. Completing this form is voluntary, but we hope that you will choose to fill it out so we can measure the effectiveness of the outreach and positive recruitment efforts we undertake pursuant to VEVRAA. Your information is confidential and any answer you provide will not be used against you in any way.

**NOTICE TO ALL VETERANS**

MSU welcomes all veterans, not just protected veterans, and encourages all qualified veterans to apply for employment at MSU. MSU is committed to offering equal opportunity to its employees and applicants for employment, without regard to veteran status. Note that veterans may have additional rights under USERRA - the Uniformed Services Employment and Reemployment Rights Act. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), at 1-866-4-USA-DOL.

Veteran Status

- I am not a protected veteran.
  - I choose not to self identify.
  - I identify as one or more of the classifications of protected veterans listed above.
- (optional)

I am a protected veteran and belong to the following classifications of protected veterans (choose all that apply):

- Disabled veteran
  - Recently separated veteran
  - Active duty wartime or campaign badge veteran
  - Armed Forces service medal veteran
- (optional)

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✓ **Next Steps**



Upon submission of this form, you will be automatically directed to the Employee Onboarding Portal. The Onboarding Portal contains:

- Tasks that should be completed before you start, during your first week, and/or within 30 days of employment
- University information including: academic calendar, MSU facts, policies and procedures
- Benefits and Retirement information
- Additional resources including: events calendar, employee discounts, maps, voluntary benefits
- ... and more!

You may also access your Onboarding Portal by logging in to your existing applicant account and selecting 'Go to employee portal' in the yellow ribbon at the top of the page.

Again, congratulations! We look forward to your contributions as you begin this next chapter of your career. If you have any questions, please feel free to contact the Human Resources Solutions Center at [solutionscenter@hr.msu.edu](mailto:solutionscenter@hr.msu.edu), or by calling us at 517-353-4434.

Submit

## FACULTY & ACADEMIC STAFF DATA COLLECTION FORM – ACKNOWLEDGEMENT OF ACCEPTANCE OF OFFER



### Acknowledgment of Acceptance of Offer

Congratulations on your position at Michigan State University!

We hope to help you with a smooth transition to the University and to assist you with helpful information.

Your offer letter is available in your Applicant Portal for your reference.

Upon submission of this page, you will be automatically directed to the Employee Onboarding Portal. The Onboarding Portal contains:

- Tasks that should be completed before you start, during your first week, and/or within 30 days of employment
- University information including: academic calendar, MSU facts, policies and procedures
- Benefits and Retirement information
- Additional resources including: events calendar, employee discounts, maps, voluntary benefits
- ... and more!

You may also access your Onboarding Portal by logging in to your existing applicant account and selecting 'Go to employee portal' in the yellow ribbon at the top of the page.

Again, congratulations! We look forward to your contributions as you begin this next chapter of your career. If you have any questions, please feel free to contact the Human Resources Solutions Center at [solutionscenter@hr.msu.edu](mailto:solutionscenter@hr.msu.edu), or by calling us at 517-353-4434.

To initiate your personalized Onboarding portal, click "submit."

**Support Staff Task List**

<b>SUPPORT STAFF - PRIOR TO FIRST DAY</b>			
<b>Task</b>	<b>Assigned to</b>	<b>Content</b>	<b>Mandatory/Optional</b>
<b>Request Systems Access</b>	Supervisor	<a href="#">Request systems access for new employee prior to their first day HERE.</a>	Mandatory
<b>Review Health Risks &amp; Physical Demands</b>	Supervisor	If this position has health risks and physical demands, please review the <a href="#">Health Risks and Physical Demands Form found HERE</a> , to determine what training and/or medical certification is required. Posting text listed below for reference:	Optional (must be added to task list by supervisor)
<b>Verify Licenses and/or Certifications</b>	Supervisor	Verify that new employee possesses the appropriate licensure and certifications required by the position. Posting information included for reference below:	Optional (on task list by default)
<b>Complete I-9 (Section 1)</b>	Employee & Supervisor	<p>In order to complete the hiring process for your new position, please complete an electronic I-9 form (<a href="#">Section 1</a>) and sign it with an electronic signature on or before your first scheduled day of work. If you are attending orientation prior to your first day of work, please complete section 1 prior to orientation.</p> <p>NOTE: <a href="#">Section 1</a> of the I-9 cannot be completed more than six months prior to your start date ({EMPLOYEESTARTDATE})</p> <p><a href="#">To complete Section 1 of the electronic I-9 click HERE to go to the Form I-9 page.</a></p> <ul style="list-style-type: none"> <li>• The Employer Code for Michigan State University is 16628</li> <li>• <b>The Location Code must be obtained from your supervisor or HR contact.</b></li> <li>• Your employment date is: {EMPLOYEESTARTDATE}</li> </ul> <p>Section 2 of the electronic I-9 must be completed within 3 business days of your date of hire. Please complete Section 2 with your hiring</p>	Mandatory

Task	Assigned to	Content	Mandatory/Optional
		department. Refer to your online confirmation/receipt page for a list of documents required to provide to the department.	
<b>Welcome Session</b>	Employee	<p>Your attendance at an MSU New Employee Welcome Presentation is strongly encouraged by MSU HR and may be required by your department.</p> <p><b>If you <i>have</i> received your MSU NetID:</b> Please visit the <a href="#">Employee Transitions website</a> to sign up for an upcoming session.</p> <p><b>If you <i>do not have</i> your MSU NetID:</b> You can sign up for the New Employee Welcome presentation <a href="#">here</a>.</p>	Optional Required
<b>Welcome Session</b>	Supervisor	<p>Please encourage new faculty and staff to sign up for a new employee welcome session.</p> <p><b>If they <i>have</i> received their MSU NetID:</b> They can visit the <a href="#">Employee Transitions website</a> to sign up for an upcoming session.</p> <p><b>If they <i>do not have</i> their MSU NetID:</b> They can sign up for the New Employee Welcome presentation <a href="#">here</a>.</p>	Optional Required
<b>International Hire Checklist and Resource Guide</b>	Supervisor	Visit OISS to learn more about onboarding tasks specific to new international faculty and scholar hires: <a href="http://oiss.isp.msu.edu/scholars/checklist.htm">http://oiss.isp.msu.edu/scholars/checklist.htm</a>	Optional (must be added to task list by supervisor)
<b>Review University Policies</b>	Employee	<p>Fill out the attached form to indicate that you have read and agree to comply with the policies listed below:</p> <ul style="list-style-type: none"> <li>• <a href="#">Employee Handbook</a>,</li> <li>• <a href="#">University Policy on Relationship Violence and Sexual Misconduct</a>,</li> <li>• <a href="#">Institutional Data Policy</a>,</li> <li>• <a href="#">Rules Governing Personal Conduct of Employees</a>,</li> <li>• <a href="#">Right-to-Know –Hazard Communication Document</a>,</li> <li>• <a href="#">Drug Free Workplace Policy</a>,</li> </ul>	Mandatory

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Task	Assigned to	Content	Mandatory/Optional
		<ul style="list-style-type: none"><li data-bbox="609 300 1040 359">• <a href="#">Collective Bargaining Agreement</a> (if applicable) and</li></ul> <p data-bbox="560 401 1094 457"><a href="#">Collective Bargaining Agreement(s)</a> of employees whom you supervise (APSA Only).</p>	

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**SUPPORT STAFF - FIRST WEEK**

Task	Assigned to	Content	Mandatory/Optional
<p><b>Complete I-9 (Section 2)</b></p>	<p>Supervisor</p>	<p>You must complete Section 2 of the I-9 within 3 days of the employee's start date ({EMPLOYEESTARTDATE}). Failure to do so will result in fines.</p> <p><a href="#">Complete Section 2 of the I-9 HERE.</a></p> <p><a href="#">View instructions for completing Section 2 of the I-9 HERE.</a></p>	<p>Mandatory</p>
<p><b>Get Your Spartan ID Card</b></p>	<p>Employee</p>	<p>Your Spartan ID Card is a photo identification card and provides access to a variety of benefits and services, including but not limited to:</p> <ul style="list-style-type: none"> <li>• <a href="#">Electronic</a> building and/or door access (access provided by the Department in which you work)</li> <li>• <a href="#">Parking</a> gate access (provided by the MSU Police Dept based on parking permit restrictions)</li> <li>• Adding <a href="#">meal plans</a> at any of the residential dining facilities at a discounted price</li> <li>• Adding <a href="#">Spartan Cash</a> which allows you to purchase goods at Sparty's convenience stores and other businesses listed on the website</li> <li>• Access to borrow books at the <a href="#">MSU library</a></li> <li>• Access to the <a href="#">Intramural Sports</a> facilities</li> <li>• Several <a href="#">discounts</a> for services and benefits</li> </ul> <p>For instructions on how to obtain your Spartan ID Card visit: <a href="http://idoffice.msu.edu/obtain/index.html">http://idoffice.msu.edu/obtain/index.html</a> The Spartan ID must be obtained in person so that your picture can be taken. The office is located in the International Center at 427 N. Shaw Lane, Room 170.</p> <p>For Spartan ID FAQs, visit: <a href="http://idoffice.msu.edu/faq/index.html">http://idoffice.msu.edu/faq/index.html</a></p>	<p>Mandatory</p>

Task	Assigned to	Content	Mandatory/Optional
<p><b>Parking Permits and Transport Options</b></p>	<p>Employee</p>	<p><b>Car:</b> Once you have a NetID, password, and your MSU Spartan Card, you may purchase a parking pass on the <a href="#">MSU Parking Permits site</a></p> <p>If you come into the MSU Parking Office to purchase an employee-parking permit in person, you will need to bring in your MSU Spartan card and current vehicle registration. If your appointment is not yet in the payroll system, you may purchase a one-month parking permit using cash or credit card. If you purchase a one-month pass you will need to go online or stop by in person a week prior to its expiration to purchase a permit valid for the year.</p> <p>During Summer Semester, complimentary parking is available in lots 15, 83, 89 and 91. <a href="#">Click here to locate the visitor and employee parking lots.</a> Permits are required in lots 15, 83, and 91 by 7am on the first day of Fall classes. Permits are required in lot 89 starting at 7am on the Monday after Labor Day.</p> <p><a href="#">MSU Parking</a> Monday-Friday from 8:00 a.m. - 4:00 p.m. 1120 Red Cedar Road (Located inside the MSU Police and Public Safety Building) East Lansing, MI Note: The wait times increase August 15 due to the number of new faculty, staff, and students. We recommend going prior to this to avoid the long lines.</p> <p>Carpool information can be found on the <a href="#">Employee Parking Permit page</a>.</p> <p><b>Bike and Moped:</b> MSU requires that all bicycles and mopeds be registered with campus police (no fees are assessed for bikes).</p> <ul style="list-style-type: none"> <li>• <a href="#">Bicycle Permits</a></li> <li>• <a href="#">Moped &amp; Scooter Permits</a></li> </ul>	<p>Optional (on task list by default)</p>

Task	Assigned to	Content	Mandatory/Optional
		<p><b>Bus:</b> The Capital Area Transit Authority provides service to, from, and around campus. Visit <a href="#">CATA's website</a> for information about costs and routes. MSU faculty and academic staff can access the Spartan Service bus routes at no cost with their MSU ID card. <a href="#">Please click here for more details about this service.</a></p> <p><b>Foot:</b> Review the <a href="#">campus map</a> to find buildings, roads, and parking lots.</p> <p>Please note: You must have an MSU Net ID and password in order to purchase a parking permit or obtain a bike/moped permit online. You may park and pay at meters and in the pay lots on campus if you do not have a parking permit.</p>	
<p><b>Activate NetID</b></p>	<p>Employee</p>	<p>The NetID is an auto-generated personal identifier at MSU and serves as the login to many university computing and networking services. The NetID also determines your MSU email address which is <i>netid@msu.edu</i>. To activate your MSU NetID, you will need a 4-digit PIN. The most efficient way to acquire your PIN is to contact the ID Office at 517-355-4500 during business hours, 8am-4:45pm Monday-Friday. The ID Office staff will assist you with NetID activation over the phone. It is also possible to request a PIN to be sent to you via FileDepot, a secure system for sharing documents. You can <a href="#">request the PIN HERE</a> and once you receive the PIN letter, follow the instructions on it to activate the NetID. The PIN Request process is not automated and may result in a delay of several days before the PIN is delivered.</p> <p>Campus-wide notifications will be sent to your <i>netid@msu.edu</i> MSU email address. The NetID must be activated in order to obtain access to many university systems. MSU systems login questions can be directed to the <a href="#">IT Service Desk, 517-432-6200</a>.</p> <p><b>Note:</b> Your hiring paperwork must be processed before your MSU NetID can be activated. Feel free to contact the ID Office at 517-355-4500 to determine whether or not your paperwork has reached their systems. Please contact your unit administrator for assistance.</p>	<p>Mandatory</p>

Task	Assigned to	Content	Mandatory/Optional
<b>Submit Emergency Contact Information</b>	Employee	To submit your emergency contact information, log in to your <a href="#">EBS Portal</a> and select 'My Personal Information.'	Mandatory
<b>Enroll in Direct Deposit or Pay Card</b>	Employee	<p>All employees have the option to select Direct Deposit or PayCard as their method of receiving payment.</p> <ul style="list-style-type: none"> <li>For more information about these two options, please visit the <a href="#">Payroll Website</a>.</li> <li>To enroll in your preferred option, log in to your <a href="#">EBS Portal</a> and select 'My Time and Payroll.'</li> <li>For detailed enrollment instructions visit: <a href="https://www.hr.msu.edu/ebshelp/bankinformation/">https://www.hr.msu.edu/ebshelp/bankinformation/</a></li> </ul>	Mandatory
<b>Register for Multi Factor Authentication</b>	Employee	<p>MSU requires a second method of authentication along with your NetID and password to log into Enterprise Business System (EBS) applications. Your NetID and password are needed to register and use your two-factor authentication credentials.</p> <p><a href="#">Register for multi-factor authentication HERE.</a></p>	Mandatory
<b>Complete Tax Withholdings (W-4)</b>	Employee	<p>For general information regarding tax withholding, please visit: <a href="http://www.ctrl.msu.edu/copayroll/Exemption.aspx">http://www.ctrl.msu.edu/copayroll/Exemption.aspx</a> . Log into the EBS portal utilizing your NetID and select 'My Personal Information', then 'Personal Profile' and select the pencil to complete the 'W-4 Tax Withholding' section.</p> <p>For detailed instructions regarding Federal, Michigan, and Local tax withholding visit: <a href="http://www.ctrl.msu.edu/copayroll/Exemption.aspx">http://www.ctrl.msu.edu/copayroll/Exemption.aspx</a></p>	Mandatory
<b>Update Veteran or Disability Status</b>	Employee	You are invited to use the <a href="#">Enterprise Business Systems (EBS)</a> to report your veteran and/or disability status so that we can collect information about the number of veterans and persons with a disability employed at MSU. Federal regulations require that MSU make an effort to collect and track	Mandatory

Task	Assigned to	Content	Mandatory/Optional
		<p>this information. This information also helps us to support the university-wide commitment to assuring equal access, promotional and equal employment opportunity. Participation is voluntary; you are not required to provide this information.</p> <p>To change your status:</p> <ul style="list-style-type: none"> <li>• Log into the <a href="#">EBS Portal</a> and select 'My Personal Information.</li> </ul> <p>To learn about the resources available to veterans and persons with disabilities visit:</p> <ul style="list-style-type: none"> <li>• <a href="#">Resources for Veterans</a></li> <li>• <a href="#">Resource Center for Persons with Disabilities</a></li> </ul> <p><i>MSU is an affirmative-action, equal opportunity employer.</i></p>	

SUPPORT STAFF - FIRST 30 DAYS			
Task	Assigned to	Content	Mandatory/Optional
<b>Spartan Experience</b>	Supervisor	<p>We must continually ask how Michigan State University will truly differentiate itself from the competition and thrive into the future. What will make the difference? Simply put, SPARTANS WILL. You will make the difference.</p> <p>This high-energy program is designed by Spartans for Spartans. Its goal is to inspire and build a high performance service mindset in all MSU team members to Deliver Outstanding Spartan Experiences with pride in everything we do and to all we serve.</p> <p>Self-enroll in this course in the <a href="#">EBS Portal</a> under 'My Career &amp; Training'.</p>	Optional (must be added to task list by supervisor)
<b>Performance Excellence Training for Supervisors</b>	Employee & Supervisor	<p>Performance Excellence is the performance management process for MSU support staff. <a href="#">Learn more about Performance Excellence</a> and why this process is important and beneficial to employee growth and organizational excellence.</p> <p>All who supervise regular support staff are required to take the online class Performance Excellence for Supervisors and pass the exam. <a href="#">View instructions on how to access this class and find more information about related training opportunities.</a></p>	Optional (must be added to task list by supervisor)
<b>New Supervisor Essentials</b>	Employee & Supervisor	<p>This session is designed to provide you with support and information to help you get off to a good start in your important role as a leader at MSU. Content includes an overview of leadership skills, administering Employee Relations, managing employee leaves, and a panel discussion with current MSU supervisors.</p> <p>Target Audience: Recently appointed or newly hired supervisors and managers</p> <p>Self-enroll in this course in the <a href="#">EBS Portal</a> under 'My Career &amp; Training'.</p>	Optional (must be added to task list by supervisor)

Task	Assigned to	Content	Mandatory/Optional
<b>Performance Planning Session</b>	Supervisor	<a href="#">Complete performance planning session</a> with new hire within 30 days of start date.	Mandatory
<b>Sign Up for Benefits</b>	Employee & Supervisor	To view all of the benefits available to you as an MSU employee, visit: <a href="https://www.hr.msu.edu/benefits/index.html">https://www.hr.msu.edu/benefits/index.html</a> . You must sign up for benefits within 30 days otherwise you will forfeit coverage until open enrollment which is annually held in October.	Mandatory
<b>Performance Excellence Training for Employees</b>	Employee & Supervisor	<p>Performance Excellence is the performance management process for MSU support staff. <a href="#">Learn more about Performance Excellence</a> and why this process is important and beneficial to employee growth and organizational excellence.</p> <p>All who supervise regular support staff are required to take the online class Performance Excellence for Supervisors and pass the exam. <a href="#">View instructions on how to access this class and find more information about related training opportunities.</a></p>	Mandatory
<b>Relationship Violence &amp; Sexual Misconduct Training</b>	Employee & Supervisor	At MSU, we are committed to creating and maintaining a campus community that is free from relationship and sexual violence. All faculty and staff are required to complete an online RVSM training program within 30 days of hire and biennially thereafter. This program includes foundational information on relationship violence and sexual misconduct as well as important information about MSU's policy and mandatory reporting protocols. You may begin by logging into the <a href="#">ORA Training Portal</a> and clicking on the RVSM - Employees line of the My Requirements tile. Note: Please ensure pop-up blocker is turned off before accessing the training. For more information and frequently asked questions, visit the <a href="#">Prevention, Outreach and Education Department website.</a>	Mandatory

**Faculty & Academic Staff Task List**

**FACULTY & ACADEMIC STAFF - PRIOR TO FIRST DAY**

Task	Assigned to	Content	Mandatory/Optional
<p><b>Complete I-9 (Section 1)</b></p>	<p>Employee &amp; Supervisor</p>	<p>In order to complete the hiring process for your new position, please complete an electronic I-9 form (<a href="#">Section 1</a>) and sign it with an electronic signature on or before your first scheduled day of work.</p> <p>NOTE: <a href="#">Section 1</a> of the I-9 cannot be completed more than six months prior to your start date ({{EMPLOYEESTARTDATE}})</p> <p><b>Steps to ensure I-9 compliancy:</b></p> <p><a href="#">To complete Section 1 of the electronic I-9 click HERE to go to the Form I-9 page.</a></p> <ul style="list-style-type: none"> <li>• The Employer Code for Michigan State University is 16628</li> <li>• The Location Code must be obtained from your supervisor or HR contact.</li> <li>• Your employment date is: {EMPLOYEESTARTDATE}</li> </ul> <p>Section 2 is then completed with your department. Refer to your online confirmation/receipt page for a list of documents required to provide to the department.</p>	<p>Mandatory</p>

Task	Assigned to	Content	Mandatory/Optional
<p><b>Activate Your MSU NetID</b></p>	<p>Employee</p>	<p>The NetID is an auto-generated personal identifier at MSU and serves as the login to many university computing and networking services. The NetID also determines your MSU email address which is <i>netid@msu.edu</i>. To activate your MSU NetID, you will need a 4-digit PIN. The most efficient way to acquire your PIN is to contact the ID Office at 517-355-4500 during business hours, 8am-4:45pm Monday-Friday. The ID Office staff will assist you with NetID activation over the phone. It is also possible to request a PIN to be sent to you via FileDepot, a secure system for sharing documents. You can <b><u>request the PIN HERE</u></b> and once you receive the PIN letter, follow the instructions on it to activate the NetID. The PIN Request process is not automated and may result in a delay of several days before the PIN is delivered.</p> <p>Campus-wide notifications will be sent to your <i>netid@msu.edu</i> MSU email address. The NetID must be activated in order to obtain access to many university systems. MSU systems login questions can be directed to the <u>IT Service Desk, 517-432-6200</u>.</p> <p><b>Note:</b> Your hiring paperwork must be processed before your MSU NetID can be activated. Feel free to contact the ID Office at 517-355-4500 to determine whether or not your paperwork has reached their systems. Please contact your unit administrator for assistance.</p>	<p>Mandatory</p>
<p><b>Register for Multi Factor Authentication</b></p>	<p>Employee</p>	<p>MSU requires a second method of authentication along with your NetID and password to log into Enterprise Business System (EBS) applications. Your NetID and password are needed to register and use your two-factor authentication credentials.</p> <p><a href="#">Register for multi-factor authentication HERE.</a></p>	<p>Mandatory</p>

Task	Assigned to	Content	Mandatory/Optional
<b>Contact Chairperson/Director or Supervisor</b>	Employee	<p>Discuss with your department chairperson, school director or supervisor:</p> <ul style="list-style-type: none"> <li>Office protocol: work location, departmental email if applicable, keys, administrative support, supplies, etc.</li> <li>Scheduled departmental or college meetings and expectations for attendance</li> <li>College- and Department-specific procedures and policies</li> <li>Teaching Assignments for upcoming year (if applicable)</li> </ul>	Mandatory
<b>Office of Faculty and Academic Staff Development</b>	Employee	<p><a href="#">Visit the Office of Faculty and Academic Staff Development website</a> to learn about resources and opportunities available to you in support of your career at MSU.</p>	Optional (on task list by default)
<b>Sign up for Emergency Alerts</b>	Employee	<p>The MSU Police Department is responsible for developing and distributing timely warning and emergency notification messages via phone, text, and/or email. These messages are intended to warn the community about certain crimes and potentially dangerous situations on or near campus. These messages inform community members about incidents that may pose an ongoing threat and provide information to promote safety and prevent similar crimes.</p> <p><a href="#">Click HERE to sign up and get additional information.</a></p>	Optional (on task list by default)
<b>Essential University Information</b>	Employee	<p>To better acquaint you to Michigan State University:</p> <ul style="list-style-type: none"> <li><a href="#">View the new faculty videos</a>. You may find these helpful in your transition to Michigan State University.</li> <li><a href="#">Review essential MSU facts</a></li> <li><a href="#">Review MSU's organizational chart</a></li> <li><a href="#">Review a map of campus</a></li> <li><a href="#">Review important dates such as semester schedules and university holidays</a></li> </ul>	Mandatory
<b>International Hire Checklist and Resource Guide</b>	Supervisor	<p>Visit OISS to learn more about onboarding tasks specific to new international faculty and scholar hires: <a href="https://oiss.isp.msu.edu/pre-arrival-orientation/new-msu/checklist-new-faculty-and-staff/">https://oiss.isp.msu.edu/pre-arrival-orientation/new-msu/checklist-new-faculty-and-staff/</a></p>	Optional (must be added to task list by supervisor)

Task	Assigned to	Content	Mandatory/Optional
<b>Request Systems Access</b>	Supervisor	<a href="#">Request systems access for new employee prior to their first day HERE.</a> Employee NetID must be activated beforehand.	Mandatory
<b>Welcome Session</b>	Employee	Your attendance at an MSU New Employee Welcome Presentation is strongly encouraged by MSU HR and may be required by your department.  <b>If you <i>have</i> received your MSU NetID:</b> Please visit the <a href="#">Employee Transitions website</a> to sign up for an upcoming session.  <b>If you <i>do not have</i> your MSU NetID:</b> You can sign up for the New Employee Welcome presentation <a href="#">here</a> .	Optional Required
<b>Welcome Session</b>	Supervisor	Please encourage new faculty and staff to sign up for a new employee welcome session.  <b>If they <i>have</i> received their MSU NetID:</b> They can visit the <a href="#">Employee Transitions website</a> to sign up for an upcoming session.  <b>If they <i>do not have</i> their MSU NetID:</b> They can sign up for the New Employee Welcome presentation <a href="#">here</a> .	Optional Required
<b>Occupational Health Risks</b>	Supervisor	The MSU Occupational Health Clinic is available to provide necessary medical monitoring/immunizations related to occupational health risks. MSU employees working in specific environments and/or performing specific duties must comply with medical surveillance and training program requirements as mandated by Federal and State laws, regulations and/or accreditation statutes. If you are uncertain about whether or not you have any occupational health requirements, please contact MSU Occupational Health (353-9137 or <a href="mailto:occhealth@hc.msu.edu">occhealth@hc.msu.edu</a> ) and they will determine if any job related risks apply.  If you know for sure that you do have occupational health requirements, please call and make an appointment to come in on the first day of work. All costs associated with employee health monitoring are covered by central administration and are not charged to the department. However, any fines for non-compliance will be charged to the departments.	Optional (must be added to task list by supervisor)

Task	Assigned to	Content	Mandatory/Optional
<p><b>Parking Permits and Transport Options</b></p>	<p>Employee</p>	<p><b>Car:</b> Once you have a NetID, password, and your MSU Spartan Card, you may purchase a parking pass on the <a href="#">MSU Parking Permits site</a></p> <p>If you come into the MSU Parking Office to purchase an employee-parking permit in person, you will need to bring in your MSU Spartan card and current vehicle registration. If your appointment is not yet in the payroll system, you may purchase a one-month parking permit using cash or credit card. If you purchase a one-month pass you will need to go online or stop by in person a week prior to its expiration to purchase a permit valid for the year.</p> <p>During Summer Semester, complimentary parking is available in lots 15, 83, 89 and 91. <a href="#">Click here to locate the visitor and employee parking lots.</a> Permits are required in lots 15, 83, and 91 by 7am on the first day of Fall classes. Permits are required in lot 89 starting at 7am on the Monday after Labor Day.</p> <p><a href="#">MSU Parking</a>  Monday-Friday from 8:00 a.m. - 4:00 p.m.  1120 Red Cedar Road (Located inside the MSU Police and Public Safety Building)  East Lansing, MI  Note: The wait times increase August 15 due to the number of new faculty, staff, and students. We recommend going prior to this to avoid the long lines.</p> <p>Carpool information can be found on the <a href="#">Employee Parking Permit page</a>.</p> <p><b>Bike and Moped:</b> MSU requires that all bicycles and mopeds be registered with campus police (no fees are assessed for bikes).</p> <ul style="list-style-type: none"> <li>• <a href="#">Bicycle Permits</a></li> <li>• <a href="#">Moped &amp; Scooter Permits</a></li> </ul>	<p>Optional (on task list by default)</p>

Task	Assigned to	Content	Mandatory/Optional
		<p><b>Bus:</b> The Capital Area Transit Authority provides service to, from, and around campus. Visit <a href="#">CATA's website</a> for information about costs and routes. MSU faculty and academic staff can access the Spartan Service bus routes at no cost with their MSU ID card. <a href="#">Please click here for more details about this service.</a></p> <p><b>Foot:</b> Review the <a href="#">campus map</a> to find buildings, roads, and parking lots.</p> <p>Please note: You must have an MSU Net ID and password in order to purchase a parking permit or obtain a bike/moped permit online. You may park and pay at meters and in the pay lots on campus if you do not have a parking permit.</p> <p><b>Foot:</b> Review the <a href="#">campus map</a> to find buildings, roads, and parking lots.</p> <p>Please note: You must have an MSU Net ID and password in order to purchase a parking permit or obtain a bike/moped permit online. You may park and pay at meters and in the pay lots on campus if you do not have a parking permit.</p>	
<p><b>Contact the WorkLife Office</b></p>	<p>Employee</p>	<p>The WorkLife Office is a one-stop destination to help facilitate success in your many personal and professional roles and can offer guidance in creating synergy between those responsibilities. The WLO offers orientation sessions to WLO resources for new faculty/staff and their spouses or significant others. There is also specific programming for international newcomers. The office staff can connect you with community and campus resources related to relocation, housing, child/eldercare, MSU culture, referrals, or other needs. You may schedule a consultation or contact the office with questions by phone (517) 353-1635 or email <a href="mailto:worklife@msu.edu">worklife@msu.edu</a>.</p>	<p>Optional (appears on task list by default)</p>

FACULTY & ACADEMIC STAFF - FIRST WEEK			
Task	Assigned to	Content	Mandatory/Optional
<b>Complete I-9 (Section 2)</b>	Supervisor	<p>You must complete Section 2 of the I-9 within 3 days of the employee's start date ({{EMPLOYEESTARTDATE}}). Failure to do so will result in fines.</p> <p><a href="#">Complete Section 2 of the I-9 HERE.</a></p> <p><a href="#">View instructions for completing Section 2 of the I-9 HERE.</a></p>	Mandatory
<b>Review Pay Periods</b>	Employee	<p>Most employee groups are paid monthly; some are paid on a bi-weekly basis. <a href="#">Reference the Payroll Schedule HERE.</a></p>	Optional (on task list by default)
<b>Get Your Spartan ID Card</b>	Employee	<p>Your Spartan ID Card is a photo identification card and provides access to a variety of benefits and services, including but not limited to:</p> <ul style="list-style-type: none"> <li>• <a href="#">Electronic</a> building and/or door access (access provided by the Department in which you work)</li> <li>• <a href="#">Parking</a> gate access (provided by the MSU Police Dept based on parking permit restrictions)</li> <li>• Adding <a href="#">meal plans</a> at any of the residential dining facilities at a discounted price</li> <li>• Adding <a href="#">Spartan Cash</a> which allows you to purchase goods at Sparty's convenience stores and other businesses listed on the website</li> <li>• Access to borrow books at the <a href="#">MSU library</a></li> <li>• Access to the <a href="#">Intramural Sports</a> facilities</li> <li>• Several <a href="#">discounts</a> for services and benefits</li> </ul> <p>For instructions on how to obtain your Spartan ID Card visit: <a href="http://idoffice.msu.edu/obtain/index.html">http://idoffice.msu.edu/obtain/index.html</a> The Spartan ID must be obtained in person so that your picture can be taken. The office is located in the International Center at 427 N. Shaw Lane, Room 170.</p> <p>For Spartan ID FAQs, visit: <a href="http://idoffice.msu.edu/faq/index.html">http://idoffice.msu.edu/faq/index.html</a></p>	Mandatory

Task	Assigned to	Content	Mandatory/Optional
<b>Review Emergency Plans</b>	Supervisor	<p>Review the following items with the employee:</p> <ul style="list-style-type: none"> <li>• Business continuity plan in the event of emergency conditions due to weather, natural disaster, major utility failure, health or environmental crisis or other unforeseen circumstances that might cause a modification or curtailment of operations</li> <li>• Emergency evacuation plan</li> <li>• Location of fire extinguishers and fire drill alarms</li> </ul>	Mandatory
<b>Enterprise Business Systems (EBS)</b>	Employee	<p>This area of EBS is only accessible to you and will reflect your personal information such as salary, retirement and benefit eligibility dates, dependents, emergency contact information, W-4 tax withholding, mailing address, ZPID (personal identifier) and direct deposit information. Log into the EBS portal (<a href="http://www.ebs.msu.edu">http://www.ebs.msu.edu</a>) utilizing your NetID and select 'My Personal Information', then 'Personal Profile'.</p>	Mandatory
<b>Complete Your Personal Profile in EBS</b>	Employee	<p>This area of EBS is only accessible to you and will reflect your personal information such as salary, retirement and benefit eligibility dates, dependents, emergency contact information, W-4 tax withholding, mailing address, ZPID (personal identifier) and direct deposit information. Login to the EBS Portal (<a href="http://www.ebs.msu.edu">http://www.ebs.msu.edu</a>) utilizing your NetID and select 'My Personal Information', then 'Personal Profile' and complete the following sections within this section of the portal.</p>	Mandatory
<b>Submit Emergency Contact Information</b>	Employee	<p>To submit your emergency contact information, log in to your <a href="#">EBS Portal</a> and select 'My Personal Information.'</p>	Mandatory
<b>Enroll in Direct Deposit or Pay Card</b>	Employee	<p>All employees have the option to select either Direct Deposit or PayCard as their method of receiving payment. Log into the <a href="#">EBS portal</a> utilizing your NetID and select 'My Personal Information', then 'Personal Profile' and select the pencil to complete the 'Direct Deposit or PayCard' section.</p> <p>For detailed enrollment instructions visit: <a href="https://www.hr.msu.edu/ebshelp/bankinformation/">https://www.hr.msu.edu/ebshelp/bankinformation/</a></p> <p>For more information about these two options, please visit the <a href="#">Payroll Website</a>.</p>	Mandatory

Task	Assigned to	Content	Mandatory/Optional
<p><b>Complete Tax Withholdings (W-4)</b></p>	<p>Employee</p>	<p>For general information regarding tax withholding, please visit:  <a href="http://www.ctrl.msu.edu/copayroll/Exemption.aspx">http://www.ctrl.msu.edu/copayroll/Exemption.aspx</a>                      . Log into the EBS portal utilizing your NetID and select 'My Personal Information', then 'Personal Profile' and select the pencil to complete the 'W-4 Tax Withholding' section.</p> <p>For detailed instructions regarding Federal, Michigan, and Local tax withholding visit:  <a href="http://www.ctrl.msu.edu/copayroll/Exemption.aspx">http://www.ctrl.msu.edu/copayroll/Exemption.aspx</a></p>	<p>Mandatory</p>
<p><b>Update Veteran or Disability Status</b></p>	<p>Employee</p>	<p>You are invited to use the <a href="#">Enterprise Business Systems (EBS)</a> to report your veteran and/or disability status so that we can collect information about the number of veterans and persons with a disability employed at MSU. Federal regulations require that MSU make an effort to collect and track this information. This information also helps us to support the university-wide commitment to assuring equal access, promotional and equal employment opportunity. Participation is voluntary; you are not required to provide this information.</p> <p>To change your status:</p> <ul style="list-style-type: none"> <li>• Log into the <a href="#">EBS Portal</a> and select 'My Personal Information.'</li> </ul> <p>To learn about the resources available to veterans and persons with disabilities visit:</p> <ul style="list-style-type: none"> <li>• <a href="#">Resources for Veterans</a></li> <li>• <a href="#">Resource Center for Persons with Disabilities</a></li> </ul> <p><i>MSU is an affirmative-action, equal opportunity employer.</i></p>	<p>Optional (on task list by default)</p>

**FACULTY & ACADEMIC STAFF - FIRST 30 DAYS**

Task	Assigned to	Content	Mandatory/Optional
<b>Sign Up for Benefits</b>	Employee & Supervisor	To view all of the benefits available to you as an MSU employee, visit: <a href="https://www.hr.msu.edu/benefits/index.html">https://www.hr.msu.edu/benefits/index.html</a> . You must sign up for benefits within 30 days otherwise you will forfeit coverage until open enrollment which is annually held in October.	Mandatory
<b>Read and Review Important Handbooks and Policies</b>	Employee	<p>The University has several handbooks and policies that are applicable to you as an employee. <a href="#">You can find these details by clicking HERE.</a></p> <p>We encourage you to become familiar with the following as applicable:</p> <ul style="list-style-type: none"> <li>• Registrar's policy with respect to the Student Rights under the Family Educational Rights and privacy Act (FERPA) <a href="https://reg.msu.edu/ROInfo/Notices/PrivacyGuidelines.aspx">https://reg.msu.edu/ROInfo/Notices/PrivacyGuidelines.aspx</a></li> <li>• Employment laws and guidelines (federal/state)</li> <li>• University-wide policies and procedures</li> <li>• Faculty handbooks</li> <li>• Faculty policies and procedures</li> <li>• Union for Non-tenure Track Faculty collective bargaining agreement.</li> </ul>	Mandatory
<b>Relationship Violence &amp; Sexual Misconduct Training</b>	Employee & Supervisor	At MSU, we are committed to creating and maintaining a campus community that is free from relationship and sexual violence. All faculty and staff are required to complete an online RVSM training program within 30 days of hire and biennially thereafter. This program includes foundational information on relationship violence and sexual misconduct as well as important information about MSU's policy and mandatory reporting protocols. You may begin by logging into the <a href="#">ORA Training Portal</a> and clicking on the RVSM - Employees line of the My Requirements tile. Note: Please ensure pop-up blocker is turned off before accessing the training. For more information and frequently asked questions, visit the <a href="#">Prevention, Outreach and Education Department website</a> .	Mandatory
<b>Financial Conflict of Interest</b>	Employee	All faculty and academic staff should read the <a href="#">MSU Conflict of Interest requirements</a> . These requirements apply to significant financial interests and other	Mandatory

Task	Assigned to	Content	Mandatory/Optional
		opportunities for tangible personal benefit that are related to the faculty or academic staff member's institutional responsibilities.	
<b>Performance Excellence Training for Supervisors</b>	Employee & Supervisor	<p>Performance Excellence is the performance management process for MSU support staff. <a href="#">Learn more about Performance Excellence</a> and why this process is important and beneficial to employee growth and organizational excellence.</p> <p>All who supervise regular support staff are required to take the online class Performance Excellence for Supervisors and pass the exam. <a href="#">View instructions on how to access this class and find more information about related training opportunities.</a></p>	Optional (must be added to task list by supervisor)
<b>New Supervisor Essentials</b>	Employee & Supervisor	<p>This session is designed to provide you with support and information to help you get off to a good start in your important role as a leader at MSU. Content includes an overview of leadership skills, administering Employee Relations, managing employee leaves, and a panel discussion with current MSU supervisors.</p> <p>Target Audience: Recently appointed or newly hired supervisors and managers</p> <p><a href="#">Self-enroll in this course in EBS.</a></p>	Optional (must be added to task list by supervisor)
<b>Read the MSU Code of Teaching Responsibility</b>	Employee	<p>This document outlines policies and information regarding your teaching responsibilities at MSU.</p> <p><a href="https://hr.msu.edu/policies-procedures/faculty-academic-staff/faculty-handbook/5Section-Instruction.html">https://hr.msu.edu/policies-procedures/faculty-academic-staff/faculty-handbook/5Section-Instruction.html</a>.</p>	Optional (must be added to task list by supervisor)
<b>Review the Academic Calendar</b>	Employee	<p>Review the academic calendar and the final examination policy and schedules for important dates.</p> <p><a href="#">Academic Policy</a></p> <p><a href="#">Final Examination Policy and Schedules</a></p>	Optional (must be added to task list by supervisor)
<b>Order Course Materials for Fall Courses</b>	Employee	<p><a href="#">MSU Course Materials Program</a></p> <p><a href="#">SBS Bookstore</a></p>	Optional (must be added to task list by supervisor)

Task	Assigned to	Content	Mandatory/Optional
		<p><a href="#">MSU Bookstore</a></p> <p><i>Note: There are several other local bookstores, but these are two of the biggest. Check with departmental colleagues about their preferred vendors.</i></p>	
<b>Contract &amp; Grant Administration</b>	Employee	<p><a href="#">Initiate the process to transfer existing research grants from other institutions HERE.</a></p>	Optional (must be added to task list by supervisor)
<b>Export Control &amp; Trade Sanctions</b>	Employee	<p>Please visit: <a href="http://exportcontrols.msu.edu">http://exportcontrols.msu.edu</a> for resources and information on MSU policy.</p>	Optional (must be added to task list by supervisor)
<b>Regulatory Compliance</b>	Employee	<p><b>REQUIRED TRAINING:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Animal Care Program Training</a></li> <li>• <a href="#">MSU Conflict of Interest</a></li> <li>• <a href="#">Human Research Protection Program</a></li> <li>• <a href="#">Environmental Health &amp; Safety Training</a></li> </ul> <p><a href="#">Recommended training and additional resources can be found here.</a></p>	Optional (must be added to task list by supervisor)
<b>Take a Self-Guided Walking Tour of Campus</b>	Employee	<p>Finally, enjoy MSU's gorgeous campus and take a self-guided walking tour! The walking tour will identify important buildings and structures all while providing some rich Spartan history!</p> <p><a href="#">Map and script provided HERE.</a></p>	Optional (must be added to task list by supervisor)

Onboarding Portal Applicant View

MICHIGAN STATE UNIVERSITY

## HUMAN RESOURCES MSU ONBOARDING PORTAL

Homepage | University at a Glance | Benefits & Retirement | Resources | Systems & Access | Contact HR

Welcome, Derek Martin

Welcome to Michigan State University. MSU Spartans work every day to find solutions to some of the world's toughest problems. We're pleased to have you join our institution.

This onboarding portal will assist you as you begin your journey at MSU. Your task list will show you what pending or upcoming tasks you need to complete. This portal will also provide you information about benefits that may be available to you, systems and access and other resources you may find helpful.

### Your task list

- Prior to First Day**
  - Complete I-9 (Section 1) Pending hiring manager completion of task
  - Prepare for Orientation
  - Review University Policies
- First Week**
  - Employee ID Card

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### University at a Glance

You may already know the ins and outs of the university or this may be your first experience with MSU. Either way, we'd like to show you the university-at-a-glance.

- Academic Calendar
- Central Administration & Academic Organization
- MSU Facts
- University-Wide Policies & Procedures

#### Your task list

**Prior to First Day**

Complete I-9 (Section 1)	Pending hiring manager completion of task
Prepare for Orientation	✓
Review University Policies	✓

**First Week**

Employee ID Card	
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### Benefits & Retirement

Michigan State University offers employees a variety of benefits options and resources. The following resources will help you navigate the benefits available to you.

- [Health Care Coverage](#)
- [Dental Coverage](#)
- [Life/Accident Insurance](#)
- [Prescription Drug Plan](#)

MSU is dedicated to offering the best possible retirement plans to help employees meet their long-term investing needs. Visit the [MSU Human Resources Retirement webpage](#) for more information on the MSU retirement plans.

If you are a new hire to MSU, you will have 30 days to enroll for benefits. Please note, you must wait until your second working day to enroll.

ALEX, our virtual benefits counselor, is available for online benefits education and decision support as you select your benefits. [Click HERE](#) to access ALEX, our virtual benefits counselor. For further assistance, contact MSU Human Resources.

#### Your task list

**Prior to First Day**

Complete I-9 (Section 1)	Due: 7 Mar 2017
Activate your MSU NetID	Due: 7 Mar 2017
Register for Two Factor Authentication	Due: 7 Mar 2017
Contact Chairperson/Director or Supervisor	Due: 7 Mar 2017

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### Resources

As an MSU employee, there are many other resources both on campus and throughout the community that you may find useful. Some of these include:

- **Discounts** – View a list of on-campus and off-campus discounts available to MSU employees.
- **Events Calendar** – Keep up-to-date with all the events happening across MSU.
- **Find People** – Find faculty, staff, students, and others affiliated with the university
- **MSU Contact Information** – Campus operators are available to answer basic inquiries and connect callers with appropriate services.
- **Maps** – Find your way around campus with any of these campus maps.
- **Voluntary Benefits** – MSU offers employees access to a variety of additional optional, employee-paid benefits through an online voluntary benefits portal at MSU Benefits Plus.
- **WorkLife** – A one-stop destination for your lifespan and career/professional life questions.
- **Greater Lansing Convention & Visitors Bureau** – Find out everything there is to do and see in Greater Lansing.
- **Annual Security and Fire Safety Report** – MSU, in compliance with a federal law called "the Clery Act," publishes an Annual Security and Fire Safety Report which provides MSU students and employees (both current and prospective) with information about the campus, police and public safety resources, reporting crimes, fire and medical emergencies, crime and fire prevention, victim support services, crime statistics, fire statistics, the crime and fire log, the University's Relationship Violence and Sexual Misconduct Policy, the MSU Drug and Alcohol Policy and more. You can access the report here: <http://police.msu.edu/wp-content/uploads/2017/09/asfsreport2017.pdf>. A hard copy of this report may be obtained by contacting the Department of Student Life at (517) 355-8286, or e-mail [stullife@msu.edu](mailto:stullife@msu.edu). One area of focus within the report is MSU's enforcement of laws and policies to prevent the illegal use of alcohol and drugs. This section, found on pages 19-26 of the report, informs you of the legal and employment-related consequences of illegal substance use, the health effects of such use, and the support services available to employees.

### Your task list

Prior to First Day	
Complete I-9 (Section 1)	Due: 2 Jul 2018
Prepare for Orientation	Due: 2 Jul 2018
Review University Policies	Due: 2 Jul 2018
First Week	
Employee ID Card	
Purchase Parking Permit	

MICHIGAN STATE UNIVERSITY

## HUMAN RESOURCES MSU ONBOARDING PORTAL

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### Systems & Access

Your NetID is your personal identifier at MSU and serves as your login to many university computing and networking services. Your NetID also determines your MSU email address which is [netid@msu.edu](mailto:netid@msu.edu) (e.g. the NetID sparty would have the email address [sparty@msu.edu](mailto:sparty@msu.edu)). Be sure to follow the instructions in the task list to activate your NetID.

The Enterprise Business System (EBS) encompasses MSU's:

- Kuali Financial System (KFS) – accounting and financial data
- Organization Of Interest (OOI) – system of record for departmental and reporting structures
- Systems Applications and Products (SAP) - HR/Payroll activity
- Spartan Marketplace – procurement solution for departmental purchases of supplies
- Business Intelligence (BI) – reporting and data
- Kuali Coeus (KC) – research administration system
- PageUp – management of faculty and staff postings

The EBS portal is also a place where employees can sign up for benefits, find their earning statements, personal profiles, training and professional development, job postings, time and attendance (support staff only), and much more. You can access the EBS portal here: <https://ebs.msu.edu>

All employees have access to EBS to view their personal information. Access to the systems within EBS require an Access Request Memorandum (ARM) and are job-specific. It is best to contact your departmental administrator so that they can provide you with access to all necessary systems.

### Your task list

Prior to First Day	
Complete I-9 (Section 1)	Due: 7 Mar 2017
Activate your MSU NetID	Due: 7 Mar 2017
Register for Two Factor Authentication	Due: 7 Mar 2017
Contact Chairperson/Director or Supervisor	Due: 7 Mar 2017