

# New starter checklist

This checklist is designed as an easy reference to assist you in capturing relevant information for your new starter.

Employee Name: \_\_\_\_\_ Personnel No: \_\_\_\_\_ Date: \_\_\_\_\_

**Note:** Items marked with this symbol ♦ are required for HESA purposes.

## (1) Pre-Arrival

Once an individual has accepted your offer there are various activities that can be completed **before they arrive**. Refer to **QRG: PANS0\_Pre Arrival and New Starter guide** as below:

Element/step	Guidance	When required	✓
<b>Record verbal offer</b>	Refer to separate Recruitment guidance	For e-Recruitment applicants only	
<b>Record accepted offer</b>			
<b>Appoint individual</b> includes: <ul style="list-style-type: none"> <li>• <b>Personal details</b></li> <li>• <b>Appointment details</b></li> <li>• <b>Pay details</b></li> </ul>	Section B (new to the University), or relevant 'Appoint' QRG	Always	
<b>Cost allocations</b>	Section C	Always	
♦ <b>Source of funds</b> (Additional Funding Information)	Section C	If externally funded	
<b>Conditional offer</b> [1]	Section D	Consider	
<b>Congregation form</b> [1]	Include with information sent to the new starter	If applicable	
<b>New starter data collection form</b> [1]	Should be sent to new starter to provide personal information	Always	
<b>Pre-emp health questionnaire</b> [1]	Include with information sent to the new starter	Always	
<b>University card form</b> [1]	Section D	Always	
<b>Equality and diversity form</b> [1]	Issue copy for direct appoints only	If applicable	
<b>Pre-employment checks</b> Note: This should include the Right to Work check which is captured in the New Starter process	Section E	Always	
<b>Generate contract</b> If New Starter Data Collection Form was not sent with Conditional Offer letter it should be sent now	Section D	Always	
<b>New starter checks</b>	Section E	Always	
♦ <b>Academic Title/Whitebook</b>	Section F	If applicable	

[1] Can also be generated via the e-recruitment module

## (2) New Starter

More detailed information regarding the individual and their appointment can be captured before they arrive or on their first day as preferred. Refer to the **Pre arrival and New Starter** guide (PANS0) as below.

Element/step	Guidance	When required	✓
<b>Personal details</b>	Section G	Always	
<b>Contact details</b> e.g. term time only address	Section G	Consider	
<b>Next of kin</b>	Section G	Always	
<b>Bank details</b>	Section G	Always	
<b>Right to work</b>	Section G	Always	
<b>Other details</b> - New Starter Additional Details (pension & tax documents)	Section H	Always	
◆ <b>Other details</b> - Previous HEI (any previous employment at a HEI)	Section H	Always	
◆ <b>Qualification details</b>	Section I	Always	
◆ <b>Academic teaching and/or research subjects</b>	Section I	If applicable	
◆ <b>Academic teaching qualifications</b>	Section I	If applicable	
◆ <b>Employment history details</b>	Section I4	Always	
◆ <b>Medical/health/social care qualifications</b>	Section J	If applicable	
<b>Update status of new starter checks</b>	Section E	Always	
<b>Probation dates</b>	Section K	Always	

The following should normally happen on or as soon as possible after the new starter's first day but must be done **by the payroll deadline** in the month in which they start. If the individual is due to start after the current month's payroll deadline but before the end of the current payroll month the appointment can be future commenced.

Element/step	Guidance	When required	✓
<b>Commence</b>	Section M	Always	
<b>Set up allowances</b>	Section N	Consider	
<b>Salary/allowances approval</b>	Section O	Always	