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|  | **New Starter Checklist 1** | \\CON-USERSVR08\Home$\admn1557\Desktop\HR logo 2\HR logo\DIGITAL\Human Resources logos_Oxford right_RGB.jpg |

# Checklist 1 – Forms and documents to produce and issue

Name of individual: Personnel no:

Complete/issue the below, once offer has been made and agreed, and **before** appointment begins.

| Element/step | PeopleXD guide | Applicable to employee/worker/non-emp? | Checkmark |
| --- | --- | --- | --- |
| **Record cost allocations**  | [Record and manage funding](https://hrsystems.admin.ox.ac.uk/new-appointments#collapse2373451) | All |  |
| **Record source of funds** | All; if externally funded |  |
| **Produce/send conditional offer letter** | [Generate documents in PeopleXD](https://hrsystems.admin.ox.ac.uk/new-appointments#collapse2448591) | As per your dept’s policy |  |
| **Produce/send congregation form** [1] | Employees: Grade 8 + |  |
| **Consider if New Starter Data Collection form is needed – issue only if not** recruited via online recruitment portal **OR** where access to HR Self-Service will not be given. | See note on the left |  |
| **Produce/send pre-emp health declaration/ questionnaire, as applicable** | Employees only |  |
| **Apply for University card** *Details must match PeopleXD (include personnel no.)* | All\**If University card won’t be requested,* [*record online payslip exception UDF*](https://hrsystems.admin.ox.ac.uk/add-and-manage-udfs-in-peoplexd-detailed-udf-guidance#collapse4509076) |  |
| **Produce/send Equality & Diversity form –** **only** where no access to HR Self-Service. | See note on the left |  |
| **Generate employment contract/letter of engagement** | All (exceptions may apply to non-employees) |  |
| **Undertake and record pre-employment checks***Including the Right to Work check*  | [Add and manage UDFs](https://hrsystems.admin.ox.ac.uk/add-and-manage-udfs-in-peoplexd) | All (exceptions may apply to non-employees) |  |
| **New starter checks** | All |  |
| **Academic Title****White Book**  | If applicable |  |