

UTSA Orientation/Onboarding Checklist

- View the PowerPoint video introducing the University of Tennessee.
- Complete I-9 using the Equifax website ([I-9 Completion](#)) prior to your start date.
- ELIGIBILITY TO WORK**
Provide evidence of eligibility to work in the U.S. to the HR Liaison prior to your start date. (This normally includes two forms of identification such as Driver's License, Social Security Card, Passport, etc.) For additional information please see the list of I-9 documents ([Form I-9 Acceptable Documents | USCIS](#)).

Documentation can be sent securely via email to systemhr@tennessee.edu by typing ENCRYPT in the subject line or by using the [UT Vault](#).

- View the [Policies](#) PowerPoint Presentation

Please fully complete the following forms prior to your start date. If you do not know your UT ID (personnel number), please leave the field blank. Completed forms may be sent to via email Human Resources systemhr@tennessee.edu via [UT Vault](#).

- PAYROLL FORMS** (may be completed and signed electronically prior to your start date).
 - [Release of Final Paycheck](#)
 - [Authorization of Disclosure](#) (*Choose one of the three options for release of information*)
 - [Designation of Beneficiary](#) (*Human Resources will sign this form as your witness*)
 - [Direct Deposit](#)
 - [Personal Data Form](#)
 - [W-4](#)
- RETIREMENT BENEFITS (Required)**—Return completed documents via email to retirement@tennessee.edu. Type **ENCRYPT** in the subject line to secure the email.
 - Required [Retirement Presentation \(Retirement Website\)](#)
- Informational materials and forms: **DUE WITHIN ONE WEEK OF HIRE DATE**
 - [2021 Exempt new hire packet](#) (offer included a monthly rate)
 - [2021 Nonexempt new hire packet](#) (offer included an hourly rate)
 - Retirement** will offer Zoom sessions on the first and third Wednesdays of each month from 11:00 am – 12:00 Noon ([Click here to join](#) with meeting ID: 913 6162 7178 and password: 818032)
 - Additional information can be found at [Benefits \(tennessee.edu\)](#).

- **HEALTH INSURANCE BENEFITS**
 - [Insurance Guide](#)
 - [Insurance To Do List](#)
- Required Forms: **DUE WITHIN 30 DAYS OF HIRE DATE**
 - [2021 Enrollment/Change Form](#) – (enroll or refuse coverage)
 - [Basic Life Insurance Beneficiary Form](#)
- Optional Forms: **DUE WITHIN 30 DAYS OF HIRE DATE**
 - [Voluntary Accidental Death](#)
 - [Long Term Disability](#) (Lincoln Financial Group)
 - [2021 Flexible Spending \(FSA\)](#)
 - [2021 Health Savings \(HSA\)](#)
 - [Securian Handbook](#) – Voluntary term life (if interested an Edison ID is required. Please contact your Insurance Coordinator for your ID)
 - Return completed forms via email to utinsurance@tennessee.edu. Type **ENCRYPT** in the subject line to secure the email.
 - [Insurance Presentation](#) ([Insurance website](#))
 - **Insurance** will offer Zoom sessions on the second and fourth Mondays of each month from 9:00 am – 10:00 am ([Click here to join](#) with meeting ID: 962 8749 3993 and password: 442565)