**Departmental Orientation Checklist Guideline**

**Suggestions for the New Employee Onboarding Process**

**Prior to Starting Work**

[ ]  Send offer letter and personalized welcome ([templates available from HRS](http://hrs.wsu.edu/Letters)):

* Department contact names, email addresses and phone numbers
* Letter must include cc to HRS Personnel File, Benefits, etc.
* Letter includes information regarding documents required for I-9
* Offer letter includes location, date and time of New Employee Orientation and if appropriate Benefits Orientation

[ ]  Confirm acceptance of offer, start date and work hours

* Send an informal announcement (via email) to the department announcing the new employee and their start date.

[ ]  Include link or information on employee benefits paperwork

* New eligible employees have 30 days to complete and submit benefits paperwork

[ ]  Directions to work site

* Inform new employee where to park first day, if appropriate provide parking pass

[ ]  Provide a link to a campus map | [Pullman](http://map.wsu.edu/) | [Spokane](http://spokane.wsu.edu/services2/visit-campus/Campus-Map-Dec-2013.pdf) | [Tri-Cities](http://tricities.wsu.edu/campusmaps/) | [Vancouver](http://www.vancouver.wsu.edu/campus-map-directions-and-parking-information) | [Everett](http://www.everettcc.edu/visitors/maps/interactive/)

[ ]  Provide Parking and Transportation information and website

[ ]  Discuss office standards and procedures

[ ]  Prepare employee’s workspace, office equipment, supplies, etc.

[ ]  Prepare for department’s one-on-one, unit-specific orientation with new hire

First Day

[ ]  Supervisor greets new employee and discusses agenda for the day

[ ]  [Payroll orientation](http://payroll.wsu.edu/newemp.htm) and/or [Direct deposit information](http://payroll.wsu.edu/fspay/directdep/directdep.htm)

[ ]  Introduce new employee to his/her co-workers

[ ]  Complete I-9 form online (strict State and Federal requirements regarding completion)

[ ]  Complete the *Foreign Worker Disclosure Form* if non-US citizen

[ ]  Inform new hire of Demographic Information Survey available on the Office for Equal
 Opportunity’s website - [oeo.wsu.edu](http://oeo.wsu.edu/)

[ ]  Tour of department/building, including restrooms, break room,

[ ]  Safety features (fire extinguisher, emergency exits, first aid kit, stairs, etc.)

* Complete [Safety Checklist](http://old-www.wsu.edu/forms2/ALTPDF/SPPM/2-16-2.pdf)

[ ]  Review [payroll dates](http://payroll.wsu.edu/) and overtime policy

[ ]  If [bargaining unit](https://hrs.wsu.edu/LR%20Home) covered employee, provide copy of contract

[ ]  Complete paperwork for keys/building access

[ ]  [CougarCard](http://cougarcard.wsu.edu/)

[ ]  Network ID – Computer Accounts; e-mail address, SkillSoft access

[ ]  Parking Permit

[ ]  Review phone usage, phone card, directories and processes for long-distance calls,

[ ]  Review Computer log-in, usage, computer use policies and laws, etc.

[ ]  Lunch and break hours explained

First Week

[ ]  Provide new employee with [ACA Employer Notification and Plan Information Document](http://hrs.wsu.edu/aca)

 within 14 days of the hire date.

[ ]  Provide an overview of all pertinent procedures

* Organizational chart
* Reporting relationships
* Provide copy of or show link to [Strategic Plan](https://strategicplan.wsu.edu/)

[ ]  Provide link to Business Policies and Procedures Manual [(BPPM)](http://www.wsu.edu/~forms/HTML/BPPM/01.01_Table_of_Contents.htm), Executive Policy Manual [(EP)](http://www.wsu.edu/~forms/HTML/EPM/EP00_Introduction_and_Table_of_Contents.htm), and Safety Policies and Procedures Manual [(SPPM)](http://www.wsu.edu/manuals_forms/HTML/SPPM/S00_Intro_and_Indexes/S02.01_Table_of_Contents.htm). Inform employee they are responsible to adhere to all the policies/procedures of WSU. A partial list of policies below:

* Policy Prohibiting Discrimination and Sexual Harassment ([EP 15](https://public.wsu.edu/~forms/HTML/EPM/EP15_Discrimination_Sexual_Harassment_and_Sexual_Misconduct.htm))
* Workplace Violence policy [(BPPM 50.30.1)](http://www.wsu.edu/~forms/HTML/BPPM/50_Safety_and_Security/50.30_Workplace_Violence.htm)
* Alcohol and Drug policy [(EP 20)](http://www.wsu.edu/~forms/HTML/EPM/EP20_Alcohol_and_Drug_Policy.htm)
* Bullying Prevention and Reporting policy ([BPPM 50.31](http://public.wsu.edu/~forms/HTML/BPPM/50_Safety_and_Security/50.31_Workplace_Bullying.htm))
* Use of University Resources [(BPPM 20.35)](http://www.wsu.edu/~forms/HTML/BPPM/20_Property/20.35_Use_of_University_Property.htm) and [(BPPM 20.37)](http://www.wsu.edu/~forms/HTML/BPPM/20_Property/20.37_Personal_Use_of_University_Resources.htm)
* Electronic Use Policy (computer resources) [(EP 4)](http://www.wsu.edu/~forms/HTML/EPM/EP4_Electronic_Communication_Policy.htm)
* Review the State Ethics Law ([www.ethics.wa.gov](http://www.ethics.wa.gov/))
* Employee Assistance Program [(BPPM 60.86)](http://www.wsu.edu/~forms/HTML/BPPM/60_Personnel/60.86_Employee_Assistance_Program.htm)
* Accident Prevention Responsibility [(SPPM 20.00)](http://www.wsu.edu/manuals_forms/HTML/SPPM/S20_Accident_Prevention/S20.00_Contents.htm)

[ ]  Provide copy of Position Description including Performance Expectations *(required for civil service and bargaining unit covered employees)*

* Review individual’s task assignments
* Discuss performance review process
* Review departmental expectations/standards (appropriate dress)
* Check on employee’s supplies and work environment
* Continue general orientation to work unit
* Describe probationary or trial service (*applicable to civil service and bargaining unit covered staff)*

[ ]  Review leave reporting and processing procedures

* Discuss annual leave and sick leave accrual
* Discuss process for requesting time off
* Discuss holiday scheduling and personal holiday

[ ]  Discuss educational/training opportunities including release time and tuition fee waiver/reimbursement

[ ]  Provide information on employee resources, including:

* [Employee Assistance Program](http://www.eap.wsu.edu/) (1-877-313-4455)
* [Ombudsman Office](http://ombudsman.wsu.edu/) (335-1195)
* [Office for Equal Opportunity](http://oeo.wsu.edu/) (335-8288)

[ ]  Provide applicable employee information depending on the employee classification *(All can be accessed at* [*hrs.wsu.edu*](http://www.hrs.wsu.edu/)*)*

* Faculty Manual
* Administrative Professional Handbook
* Washington Administrative Code for Civil Service employees
* Contract information for Bargaining Unit covered employees

[ ]  During the first week take new employee to lunch, and/or arrange for a peer “mentor” to do so.

First Month

[ ]  Task assignment and progress meetings – meet with employee periodically to review progress, assess training needs, offer coaching and receive feedback and questions

* Provide feedback on progress to date; offer suggestions
* Verify completion and attendance of New Employee and Benefits Orientation
* Discuss online training resource courses and logon procedures
* Schedule any required training for entry level supervisors, chairs and directors, payroll procedures, State Ethics Law, Cash Handling, Cultural Competency, etc.
* [ ]  Ensure that benefit forms are completed and submitted within first month of employment

[ ]  Complete Required Discrimination and Sexual Harassment Prevention Course *(within first 6 months of employment.)*

[ ]  If significant performance concerns contact HRS

First Quarter

[ ]  Task assignment and progress review meetings (see above)

[ ]  Within first 3 months of probationary or trial service appointment review expectations and provide feedback

* Assess/discuss performance needs
* Schedule development/skill enhancement training

[ ]  If significant performance concerns contact HRS

First Six Months

[ ]  Task assignment and progress review meetings (see above)

[ ]  Conduct Performance Evaluation for Probationary or Trial Service employees prior

to conclusion of probationary or trial service period (designated 6-month period)

[ ]  If significant performance concerns contact HRS

[ ]  Ensure employee has completed required Discrimination and Sexual Harassment Course

First Year

[ ]  Complete employee’s Annual Review (not applicable to bargaining unit covered employees)

* Review position description and performance expectations and revise if necessary
* Meet and discuss Annual Performance Evaluation; provide copy of current position description and performance expectations
* Discuss development and training opportunities
* Discuss any pay increases and process

[ ]  If significant performance concerns contact HRS

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Hire: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Probationary or Trial Service End date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 *(Civil Service employees*)

cc: Supervisor

Department File