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):
  ☐ 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 | Spokane | Tri-Cities | Vancouver | Everett

☐ 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 and/or Direct deposit information
☐ 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
☐ Tour of department/building, including restrooms, break room,
☐ Safety features (fire extinguisher, emergency exits, first aid kit, stairs, etc.)
  ☐ Complete Safety Checklist
☐ Review payroll dates and overtime policy
☐ If bargaining unit covered employee, provide copy of contract
☐ Complete paperwork for keys/building access
☐ CougarCard
☐ 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 within 14 days of the hire date.

New Employee Checklist
Updated November 2015
Provide an overview of all pertinent procedures
   □ Organizational chart
   □ Reporting relationships
   □ Provide copy of or show link to Strategic Plan
Provide link to Business Policies and Procedures Manual (BPPM), Executive Policy Manual (EP), and Safety Policies and Procedures Manual (SPPM). 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)
   □ Workplace Violence policy (BPPM 50.30.1)
   □ Alcohol and Drug policy (EP 20)
   □ Bullying Prevention and Reporting policy (BPPM 50.31)
   □ Use of University Resources (BPPM 20.35) and (BPPM 20.37)
   □ Electronic Use Policy (computer resources) (EP 4)
   □ Review the State Ethics Law (www.ethics.wa.gov)
   □ Employee Assistance Program (BPPM 60.86)
   □ Public Records | Release of Public Records (BPPM 90.05)
   □ Accident Prevention Responsibility (SPPM 20.00)

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 (335-5759)
   □ Ombudsman Office (335-1195)
   □ Office for Equal Opportunity (335-8288)

Provide applicable employee information depending on the employee classification (All can be accessed at 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