

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.

- 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