**Departmental Orientation Checklist Guideline**

**Suggestions for the New Employee Onboarding Process**

**Prior to Starting Work**

[ ]  Send offer letter for staff via Workday or for faculty outside of Workday utilizing [templates available from](http://hrs.wsu.edu/Letters) 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
* Offer letter includes Governor Vaccine Requirement Proclamation language

[ ]  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](https://maps.wsu.edu/)

[ ]  Provide Parking and Transportation information and [website](https://transportation.wsu.edu/)

[ ]  Provide applicable information from [Candidate Experience](https://hrs.wsu.edu/managers/recruitment-toolkit/candidate-experience/) page

[ ]  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 their 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 self-identification fields in Workday. There is a guide available at <https://jira.esg.wsu.edu/servicedesk/customer/kb/view/156964405>.

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

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

* Complete [Safety Checklist](https://policies.wsu.edu/prf/index/manuals/2-00-contents/2-16-safety-orientation/)

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

[ ]  Complete paperwork for keys/building access

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

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

[ ]  [Parking Permit](https://transportation.wsu.edu/permits/)

[ ]  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

[ ]  Confirm the employee has been signed up to attend [New Employee Orientation](https://hrs.wsu.edu/training/neo/) within their **first three weeks.**

[ ]  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)](https://policies.wsu.edu/prf/sppm-contents/). 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://policies.wsu.edu/prf/index/manuals/executive-policy-manual-contents/ep15-discrimination-sexual-harassment-and-sexual-misconduct/))
* Alcohol and Drug policy [(EP 20)](http://www.wsu.edu/~forms/HTML/EPM/EP20_Alcohol_and_Drug_Policy.htm)
* Workplace Violence policy [(BPPM 50.30)](http://www.wsu.edu/~forms/HTML/BPPM/50_Safety_and_Security/50.30_Workplace_Violence.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/))
* Accident Prevention Responsibility [(SPPM 2.10)](https://policies.wsu.edu/prf/index/manuals/2-00-contents/2-10-accident-prevention-responsibility/)

[ ]  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 staff)*

[ ]  Review leave reporting and processing procedures

* Discuss annual leave and sick leave accrual
* Discuss process for requesting time off
	+ Workday [login](https://wd5.myworkday.com/wsu/d/home.htmld)
	+ Workday [Entering Time Off](https://confluence.esg.wsu.edu/display/WKB/Employee%2BRequest%2Band%2BCorrect%2BTime%2BOff)
	+ Workday [Entering Time Worked](https://confluence.esg.wsu.edu/display/WKB/Enter%2Band%2BCorrect%2BTime%2B-%2BEmployee)
* Discuss holiday scheduling and personal holiday
* Discuss [leave and disability related programs](https://hrs.wsu.edu/employees/disability-services/) ([BPPM 60.56](https://policies.wsu.edu/prf/index/manuals/60-00-personnel/60-56-faculty-administrative-professional-personnel-leave/#FML) or [BPPM 60.57](https://policies.wsu.edu/prf/index/manuals/60-00-personnel/60-57-civil-service-employee-leave/))
* Discuss employee rights under the [Family Medical Leave Act](https://www.dol.gov/sites/dolgov/files/WHD/legacy/files/fmlaen.pdf)
* Discuss employee rights related under [Washington State Paid Family and Medical Leave](https://hrs.wsu.edu/wp-content/uploads/2021/03/PFML-Employee-Statement-of-Rights_2021-03-24.pdf)

[ ]  Discuss educational/training opportunities including release time and tuition fee waiver/reimbursement ([BPPM 60.70](https://policies.wsu.edu/prf/index/manuals/60-00-personnel/60-70-tuition-waivers-fall-spring-semesters/))

[ ]  Provide information on employee resources, including:

* [Employee Assistance Program](http://www.eap.wsu.edu/) 1-877-313-4455
* [Ombudsman Office](http://ombudsman.wsu.edu/) 509- 335-1195
* [Compliance and Civil Rights](https://ccr.wsu.edu/) 509-335-8288
* [Disability Services](https://hrs.wsu.edu/employees/disability-services/) 509-335-4521
* [General Policies and Procedures](https://hrs.wsu.edu/resources/policies-resources/)

[ ]  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

[ ]  Request applicable systems accesses based on position responsibilities

[ ]  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 login 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 Prevention 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