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 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
- Provide Parking and Transportation information and website
- Provide applicable information from 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 and/or Direct deposit information
- 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
- 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
- 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**
- Confirm the employee has been signed up to attend New Employee Orientation within their first three weeks.
- 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
New Employee Onboarding Checklist

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)
- Alcohol and Drug policy (EP 20)
- Workplace Violence policy (BPPM 50.30)
- 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)
- Accident Prevention Responsibility (SPPM 2.10)

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
  - Workday Entering Time Off
  - Workday Entering Time Worked
- Discuss holiday scheduling and personal holiday
- Discuss leave and disability related programs (BPPM 60.56 or BPPM 60.57)
- Discuss employee rights under the Family Medical Leave Act
- Discuss employee rights related under Washington State Paid Family and Medical Leave

Provide information on employee resources, including:
- Employee Assistance Program 1-877-313-4455
- Ombudsman Office 509-335-1195
- Compliance and Civil Rights 509-335-8288
- Disability Services 509-335-4521
- General Policies and Procedures

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

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