

## 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
- 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
- Inform new hire of demographic self-identification fields in Workday. There is a guide available at <https://jira.esg.wsu.edu/service desk/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](#)
- 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
  - 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](http://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](#)
- Discuss educational/training opportunities including release time and tuition fee waiver/reimbursement ([BPPM 60.70](#))
- 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](http://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