

# ONBOARDING CHECKLIST FOR NEW EMPLOYEES AND SUPERVISORS

**New Employee Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Department/Supervisor:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_

This checklist is not meant to limit the supervisor in the orientation of the new employee, but rather to act as an outline of the minimum information and tasks that should be completed before the first day of work.

Onboarding a new employee is a joint effort to be completed by many Departments: Human Resources, Payroll, the Department Supervisor, and the employee. Timely completion of all items will ensure a smooth and successful onboarding experience that with support our employees and welcome them to WCU. Please note, several tasks must be completed in chronological order (\*). If you experience any issues with completing any responsibilities below, please contact Human Resources at [HRS@wcupa.edu](mailto:HRS@wcupa.edu).

All items on the checklist are to be completed by the assigned Department. The boxes beside each item should be checked after each item is completed. Once the applicable boxes are checked, the checklist should be signed and retained by the employee and the direct supervisor, and sent to [HRS@wcupa.edu](mailto:HRS@wcupa.edu) for inclusion in the electronic personnel file. For further information, contact the Office of Organizational Development at (610) 436-3380.

## NEW EMPLOYEE TO-DO LIST OVERVIEW

- ☐ Complete and upload via DocuSign your hiring paperwork (I-9, W-4 and supporting documents) to Human Resources.
- ☐ Complete all clearances and provide an original copy of the FBI clearance to Human Resources prior to the start date. No employee is permitted to begin work without the successful completion and review of all clearances.
- ☐ Complete the Information Services and Technology's [Personal Account Application](#) for your e-mail and other technology account(s) access.
- ☐ Get a picture taken for your Identification Card (Ram E-card) in the Lower Level of Sykes Student Union.
- ☐ Bring necessary documentation to obtain a Parking Permit from the Office of Public Safety.
- ☐ Review "Topics to be Covered by Department/Supervisor" with your supervisor (*see below*).
- ☐ Complete the Benefits Orientation on: \_\_\_\_\_ and enroll in benefits within 30 days of start date.
- ☐ Go to [www.passheacademyregister.com/](http://www.passheacademyregister.com/) to register for the next Welcome or contact (610) 436-3380.

## INFORMATION COVERED IN THE BENEFITS ORIENTATION

## REQUIRED FOR THOSE ELIGIBLE

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Health Benefit Coverage | <input type="checkbox"/> Retirement Election                            | <input type="checkbox"/> Flexible Spending Accounts |
| <input type="checkbox"/> Tuition Waiver          | <input type="checkbox"/> State Employee Assistance Program              | <input type="checkbox"/> Life Insurance Coverage    |
| <input type="checkbox"/> Long Term Disability    | <input type="checkbox"/> Supplemental Benefits: Dental, Vision, Hearing |   |
| <input type="checkbox"/> Workers Compensation    | <input type="checkbox"/> Leave Accrual                                  | <input type="checkbox"/> Other: _____               |

## INFORMATION COVERED IN THE NEW EMPLOYEE WELCOME

## RECOMMENDED

- ☐ President's Welcome Address
- ☐ Important Information about WCU's past, present and future direction
- ☐ Campus Walking/Van Tour
- ☐ Service Provider Presentations: Public Safety; Diversity, Equity and Inclusion; Rec. Center; and Library.
- ☐ Bargaining Unit Breakout Group (if applicable)

## TOPICS TO BE COVERED BY DEPARTMENT/SUPERVISOR

## PLEASE CHECK OFF ITEMS AS YOU ADDRESS THEM

### Work Responsibilities and Assignments

- ☐ **Orientation Programs**—Inform employee that attendance at the Human Resources benefits orientation is required and the New Employee Welcome is highly recommended.
- ☐ **Position Description**—Review the employee's position description and job specific standards document. Give the employee a copy of both forms. Explain how they are related to the Performance Evaluation Process. Discuss salary structures and potentially scheduled increases.
- ☐ **Work Assignments**—Arrange for specific work assignments and assist in initial performance.
- ☐ **Job Assistance**—Designate a person who the employee may call on for questions, clarification and future

assistance.

- ☐ **Probationary Period Process**—Explain the process and how it is linked to the performance management process. (Probationary Periods: SUA—12 months with 3,6,9 month informal reviews; Management—sets objectives and reviewed at 6 months; All other bargaining units are reviewed based on the job description and standards at 6 months).
- ☐ **Quality**—Discuss the departmental quality standards and link to the University's strategic plan.
- ☐ **Records**—Locate any records or files necessary for the job. Explain which records may be confidential and how confidential information is managed.
- ☐ **Standards of Conduct**—Review acceptable and unacceptable performance and how such are handled (Misconduct Policy). For more information, attend the New Employee Welcome.
- ☐ **Labor Relations/Employee Relations**—Discuss whom to talk with regarding labor relation issues.

## Work Environment

- ☐ **Co-workers and Supervisors**—Introduce and explain their work relationships.
- ☐ **Department Organizational Chart**—Explain department organization stating names, titles and responsibilities. University Org Chart is available upon request to the Human Resources Office.
- ☐ **Students**—Introduce student employees and discuss the importance of keeping relationships with students on a professional level.
- ☐ **Sexual Harassment**—Discuss policy and give the employee the Diversity, Equity and Inclusion Policy and Procedures Guide discussing all forms of harassment and discrimination. Attend the New Employee Welcome for more information.
- ☐ **Campus**—Using a map (visitor's guide or on-line), show and describe the location of the department and building in relation to other buildings on campus. Inform of any buildings that may need to be located.
- ☐ **Equipment**—Explain use of equipment, location and how to obtain supplies. Use of equipment for personal reasons is prohibited.
- ☐ **Non-work Related Departmental Activities**—Include office functions; i.e. birthday celebrations, coffee and water clubs.
- ☐ **Key Locations**—Explain where the bathroom, office lounge, and kitchen is located, where to eat on/off campus, and nearest ATM.
- ☐ **Americans with Disabilities** – If the employee has questions about or wishes to request ADA accommodations, they should contact Human Resources at 610-436-3419.

## Work Procedures

- ☐ **Personal Emergency Situations**—Review when and whom to call when absence is necessary because of personal emergencies.
- ☐ **Emergency Contact**—Determine how/where supervisor can contact employee during non-working hours.
- ☐ **Pay**—Explain when and where pay statements/checks can be accessed.
- ☐ **Managing Conflicts**—Share guidelines and expectations for solving conflicts with internal and external customers via telephone, e-mail, or face-to-face.
- ☐ **Employee Identification Cards (Ram E-Card)**—Discuss importance of identification cards, where to obtain them, and how they may be used; i.e. building access, on and off campus dining, vending, or bookstore.
- ☐ **Computer Access**—Request an e-mail account and any other database usernames/passwords needed.

[Personal Account Application](#). Explain personal and professional usages.

- ☐ **Parking**—Discuss procedure for obtaining parking pass and where permissible to park.
- ☐ **Dress**—Explain any dress requirements, i.e. specific apparel, acceptable casual Friday dress.
- ☐ **Food and Beverages**—Explain any restrictions in the work area.
- ☐ **Clean Air**—Explain no-smoking policy.
- ☐ **Telephone**—Explain how the telephone should be answered and departmental practices for telephone usage and personal calls. Contact the Telecommunications Office for any specific instructions or training.
- ☐ **Talking and Noise Level**—Explain any restrictions on talking with co-workers, playing radios, etc.
- ☐ **Training Opportunities**—Explain that there are over 100 WCU developed/curated personal and professional training opportunities available 24/7 and 1000s of on-line courses/videos available 24/7 through LinkedIn Learning at [www.wcupa.edu/hr/training](http://www.wcupa.edu/hr/training).

Also explain that Information Services and Technology offers Faculty and Staff Training (FAST) at <http://www.wcupa.edu/infoservices/training/schedule.aspx>

## Work Schedule

- ☐ **Work Days**—Specify day, starting and ending times and shift schedule. Explain any exceptions and reasons for them.
- ☐ **Overtime Review**—If applicable, discuss authorization required for overtime and probability for scheduling.
- ☐ **Meal periods and Breaks**—Review length of periods, time schedule and what most employees do for the periods.
- ☐ **Annual Leave**—Discuss how it is requested (i.e. orally, written, online), periods of time leave may not be requested, length of leave period and from whom to request the leave.
- ☐ **Sick Leave**—Explain who should be notified, their phone number, when to call, frequency of keeping posted, when a physician's note is necessary (after three days of absence due to illness/injury).
- ☐ **Inclement Weather**—Discuss inclement weather and whether the employee is identified as "essential personnel." Explain where employees can obtain information concerning closure of the college or reduced schedule. See WCU Alert below.

### Work Safety

- ☐ **Security and Personal Safety**—Explain how to keep personal belongings secure; whom to contact if property or personal safety is compromised and/or if a victim of a crime.
- ☐ **Emergency Medical Procedures, Equipment and First Aid Supplies**—Explain whom to notify and what to do in case of medical emergencies. Locate first aid supplies, AEDs and other emergency medical safety equipment. Demonstrate use where appropriate.
- ☐ **Portable Fire Extinguishers, Manual Pull Stations**—Locate fire safety equipment in relation to employee's work area and whom to contact in case of a fire.
- ☐ **Emergency Evacuations, Emergency Exits and Designated Meeting Places** —Explain emergency evacuation procedures and stress the expectation that everyone will evacuate when the alarm sounds.
- ☐ **Accident and Injuries**—Discuss accident reporting procedures and means to report on-the-job accidents to workers' compensation. Instruct whom to notify if medical attention is necessary.
- ☐ **Safety Procedures and Equipment**—Instruct employee on their department's internal safety regulations and safety equipment.
- ☐ **WCU Alert**—Explain that employees are automatically subscribed to receive WCU announcements (on-campus emergencies, class cancellations, delayed openings, university closings, etc.) through text messages to cell phones (SMS), wireless PDAs, pagers, and e-mail addresses. <http://www.wcupa.edu/wcualert/>

### Other Topics Covered

I have ensured the above checked items were addressed with this employee.

\_\_\_\_\_  
(Supervisor's Signature) (Date)

I agree the above checked items have been explained to me and I've had an opportunity to discuss and ask questions for clarification.

\_\_\_\_\_  
(Employee's Signature) (Date)