



# ONBOARDING CHECKLIST FOR SUPERVISORS AND EMPLOYEES

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

**Title:** \_\_\_\_\_  
TO BE FILLED OUT BY SUPERVISOR

**Department:** \_\_\_\_\_  
TO BE FILLED OUT BY SUPERVISOR

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 that should be proactively completed before the new hire start date and the initial weeks following the date of appointment.

All items on the checklist are to be discussed with the new employee by the employee’s supervisor or designee. Completed checklists should be **retained in the department**. **Signed job descriptions should be emailed to [hrs@wcupa.edu](mailto:hrs@wcupa.edu)**. For further information, contact Jaime Whitcomb in Organizational Development at x 3370.

**HUMAN RESOURCES REPRESENTATIVE HAS COMPLETED (OR WILL COMPLETE) THE FOLLOWING:**

- Instruct employee to obtain Identification Card (Ram E-card) in the Lower Level of Sykes Student Union.
- Instruct employee to obtain a permanent Parking Permit from the Office of Public Safety. A 30-day temporary parking pass can be issued from the HR office.
- Send completed DocuSign new hire packet to Payroll - This will trigger Identity Management to create WCU ID, email account, and add to directory.
- Provide information on employee onboarding training modules and required compliance training-
- Schedule benefit orientation, if applicable.

**SUPERVISOR NEXT STEPS: TO BE COMPLETED PRIOR TO START DATE IF POSSIBLE**

- Request equipment through [IS&T/ ServiceNow](#):
  - Purchase new technology equipment (laptops, phones, etc.). Please refer to our [Green Office Program](#) when considering printing options.
  - Request a standard university RamPhone.
  - Request network access- wireless, port installation, etc.
- Obtain office keys for new employee
- Account Access - Request software/platforms installed on applicable devices.
  - SAP, Microsoft 365, Duo Enrollment, shared mailboxes, and Mobile Device Email Configuration can be requested through an IS&T ServiceNow Request. Access the form here: <https://wcupaprod.service-now.com/sp>
  - Platforms supporting students (RamPortal, OnBase, Navigate, and SAS) should be requested through Academic and Enterprise Services (AES) ServiceNow form. Access the form here: <https://wcupaprod.service-now.com/aes>
- Building Access- submit [Electronic Security Request Form](#) to Public Safety. You will need the BID# and SOES# located on the back of the employee RamCard\*\*
- Reporting to work- discuss location and permissible parking area with employee

\* Certain permissions in Departmental systems require FERPA Policy training and corresponding signed acknowledgment. This training should be completed by the employee in their D2L account.

\*\*this form cannot be completed unless the employee has obtained their RamCard

**TOPICS TO BE COVERED BY DEPARTMENT/SUPERVISOR : TO BE COVERED THE FIRST DAY THROUGH FIRST WEEK OF START DATE.**

**Orientations, Work Responsibilities and Assignments**

**Orientation Programs**

- Benefits Orientation- is required for all benefits eligible employees. This is scheduled by HR.
- New Ram Training – Supervisors should allow time for new employees to complete new employee training during the first week(s) of employment. These self-paced modules can be accessed on the [Employee Onboarding](#) website. Please review the modules with your employee and discuss topics and/or answer questions, as needed.

**Job Description/ MPQ** - Review the employee's job description and job-specific standards document. Give the employee a copy of both forms. Explain how they are related to the performance evaluation process. Upon review, have the employee sign a copy of the position description. **A signed copy of must be sent to the HR office at [hrs@wcupa.edu](mailto:hrs@wcupa.edu).**

**Compliance with WCU Policies and Training**

- In-Person I9 Verification – **All new employees must complete their in-person I-9 verification at the Human Resources Office on or before the 3rd day of employment.** Contact [hrs@wcupa.edu](mailto:hrs@wcupa.edu) if you have additional questions.
- Complete FERPA training in D2L (all employees)
  1. Sign into D2L
  2. Under the training tab, click on Employee FERPA Training
  3. Complete the training module.
- Division for Access and Compliance resources -visit [Home - Office of Equal Opportunity and Compliance - WCU of PA](#) to help build awareness and promote a positive campus climate.
- Review the [WCU Training Directory](#)- a storefront to training offered across campus.
- Complete Vector Solutions training – Training modules are automatically assigned from PASSHE. New employees will receive automated reminders to complete training. Access the Vector Solutions platform [Vector LMS, Higher Education Edition Training :: My Assignments](#)

**Work Assignments**—Assign specific work projects and assist with initial performance. Provide feedback and answer questions as they arise.

**Probationary Period Process**—Review the probationary process and probationary evaluations. (Probationary Periods: SUA—12 months with 3,6,9-month informal reviews; Management, Nurses, AFSCME are 6 months, POA is 365 days. Additional information can be found on the [Performance Management](#) website. You will receive DocuSign notification from the Office of Human Resources and Labor Relations when evaluations are due to be completed.

**Contribution**— Discuss how their specific role contributes to a Community of Educators, how it relates to the University's strategic plan, and how it directly or indirectly impacts student success. Review the current strategic plan. Click [here](#) to access the strategic plan.

- Tour**—Tour office space including bathroom, office lounge, and kitchen location. Explain where to eat on/off campus. Introduce coworkers and explain their working relationships.
- Communication**- Explain common ways individuals communicate within your team or department. Assist with setting up Teams, Zoom, or other accounts. Add them to the appropriate team channels.
- Department Organizational Chart**—Explain roles and responsibilities within the department and organizational hierarchy.
- Campus**—Using a [campus map](#), show and describe the location of the department and building to other buildings on campus. Inform the employees 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, recognizing colleagues

## Work Procedures

- Personal Emergency Situations**—Review when and whom to call when absence is necessary because of personal emergencies.
- 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.
- Dress**—Explain any dress requirements, i.e. specific apparel, acceptable casual Friday dress.
- Telephone**—Explain how the telephone should be answered and departmental practices for telephone usage and personal calls. The ServiceNow website contains a useful instructional guide and additional training.

## Work Schedule

- Work Schedule**—Specify day, starting and ending times and shift schedule. Explain any exceptions and reasons for them. Review the meal and break policy standard for the role. Refer to CBA when necessary. If applicable, review the [Remote Work Policy](#).
- Overtime Review**—If applicable, discuss the authorization required for overtime and the probability for scheduling.
- Time Off / Leave of Absence**
  - **Time Off – Annual, Personal**  
Enter in ESS – Review process.  
Schedule in advance- review how it is requested, approved, etc.
  - **Time Off – Unexpected**  
Employees should call their supervisor at the start of the workday.  
Explain Departmental Protocol.  
Enter in ESS upon return.  
Required documentation for 3+ sick days.
  - **Leave of Absence- Contact HR Leave Manager, Susan Robb**
  - **Unpaid Leave** - Unpaid leave should be granted in exceptional circumstances only. For new hires who have no accrued time and for whom leave approval was granted at the time of hire, unpaid leave may be taken. Note: all applicable paid leave must be exhausted before unpaid leave is granted. In addition, the supervisor who granted the unpaid leave must send an email to [Payroll@wcupa.edu](mailto:Payroll@wcupa.edu) indicating the exact reason for the absence and who approved the unpaid leave.
- 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

- 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.
- Safety Procedures, Portable Fire Extinguishers, Manual Pull Stations**—Instruct employee on department-specific safety procedures and equipment, locate fire safety equipment in employee’s work area, and whom to contact in case of a fire. Department-specific.
- 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. Information on workplace injuries can be found here; <https://www.wcupa.edu/hr/work-related-injuries.aspx>
- Review the WCU Safe App at <https://www.wcupa.edu/dps/WCUSafe/>

**Additional Items for Employment and Remote Work**

- Assign an onboarding buddy who will serve as a direct contact to answer questions and help with technical issues.
- Formally design informal communication: provide structured opportunities for new hires to get to know their coworkers (meet & greets, coffee chats, introductory meetings with campus business partners)
- Communication- Explain the most common ways individuals communicate within your team or department. Assist them with setting up Teams and Zoom accounts. Add them to the appropriate teams.
  - Telecommunications and Cisco Jabber- using your computer or mobile device to make and receive calls while using your university phone number. Click [HERE](#) for instructions.
  - Virtual meeting access through Teams and Zoom.
  - Process for obtaining work supplies.
  - Outline work logistics and expectations- how-to guides, documentation to processes, solutions, and policies
  - Outline a schedule to meet often during the initial days and weeks of employment to discuss concerns and answer questions.

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)