



# ONBOARDING CHECKLIST FOR SUPERVISORS

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

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

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

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

**WCU ID:** \_\_\_\_\_

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. The boxes beside each item should be checked after each item is discussed. Once the applicable boxes are checked, the checklist should be signed by both parties and **retained in the department**. 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.
- Complete the Information Services and Technology’s Personal Account Application for **e-mail account set up and access**.
- Add employee into D2L *NewRam Experience*. (Optional supplemental onboarding)
- Send completed DocuSign new hire packet to Payroll.
- Schedule benefit orientation, if applicable.

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

- Contact [IS&T/ ServiceNow](#) to complete the following, if applicable:
  - Purchase new technology equipment (laptops, phones, etc). Please refer to our [Green Office Program](#) when considering printing options.
  - Request any shared mailboxes.
  - Request a standard university RamPhone.
  - Request network access- wireless, port installation, etc.
- Obtain office keys for new employee
- Request university approved software installed on applicable devices (SAP, Microsoft365, etc) [HERE](#)
- 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 such as PeopleSoft for SAP, 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.

#### Work Responsibilities and Assignments

- Orientation Programs**—Inform employee that attendance at the Human Resources benefits orientation is required (if applicable). The NewRam Experience and Golden Welcome in-person orientation is highly recommended. An email invitation will be sent to the employee to schedule a Golden Welcome Session.
- 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. 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**

**Compliance with WCU Policies**

- 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
- Sign Acceptable Use Policy and Confidentiality Statement in MyWCU (all employees)
  1. Log into myWCU
  2. Go to the upper right-hand corner to arrow icon.
  3. From there, go to Navigator.
  4. Go to Human Resources/Payroll.
  5. Go to Employee Data
  6. In there you will see, Staff Data Sheet. Select this option.
  7. On the third tab, WCU Policies, there are (2) statements that need reviewed then check off box that you have read them.
  8. From there, go back to the first tab and check off the bottom box, saying you have read both statements.

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

**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).

**Contribution**—Discuss how their specific role contributes to the broader goals of the University and how it relates to the University's strategic plan. Click [here](#) to access the strategic plan.

**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 relations issues. If the employee has questions about or wishes to request ADA accommodations, they should contact Human Resources at 610-436-3419.

**Training-** visit [Division for Diversity, Equity, and Inclusion](#) training and education page to sign up for workshops that help build awareness, skills and competencies and promote a positive campus climate.

## Work Environment

**Tour**—Explain where the bathroom, office lounge, and kitchen is located, and where to eat on/off campus. Introduce coworkers and explain their working relationships.

**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 appropriate teams.

**Department Organizational Chart**—Explain department organization stating names, titles, and responsibilities. University Org Chart is available upon request to the Human Resources Office.

**Campus**—Using a [campus map](#) 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

## 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.
- 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 at [LinkedIn Learning](#). Additionally, Information Services and Technology offers Faculty and Staff Training (FAST) [here](#)

## 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.
- 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 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.
- WCU Alert**—Explain that employees are automatically subscribed to receive WCU announcements (on-campus emergencies, class cancellations, delayed openings, university closings, etc.) directly to their e-mail address. Sign up for [text alerts](#) here.
- Review panic button location and use on office RamPhone.

## Additional Items for Remote Employment

- Assign an onboarding buddy that 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 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)