**ONBOARDING CHECKLIST**

***University, Non-Instructional Academic Staff, Limited, and Temporary***

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| **POSITION INFORMATION** |
| **New Employee:** |       |
| **Position:** |       |
| **Supervisor:** |       |
| **Start Date:** |       |
| **Department:** |       |

*INSTRUCTIONS*: This checklist is provided to assist supervisors in completing the hiring process and orienting new employees. After a particular topic has been covered, the completion date should be entered in the column to the right of it. When the entire checklist is completed, the signed form should be kept in your departmental files.

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| **PRE-ARRIVAL** | **Completion****Date** |
| [ ]  | Check that the work area is equipped and ready for new employee. For a door or desk nameplate, click on “Facilities/Operations Work Order Request Form” on the[**Facilities Planning & Management**](http://www.uwgb.edu/facilities/) website and follow the instructions. Set up a mailbox or bin in your office for the new employee. |       |
| [ ]  | Contact [**Information Technology**](https://www.uwgb.edu/it/) to verify that the office phone has been activated and a staff directory is available. |       |
| [ ]  | Order keys from [**University Police**](http://tma-1:81/key_request_form_single.html) online, and consider building access and maintenance requests (if applicable). |       |
| [ ]  | Ensure network account access is set up (Help Desk – Ext. 2309). HR will enter employee into HRS system (after receiving employee information), and IT will create an email account. The supervisor will receive an email from IT requesting access information for shared drives and software. Supervisor will receive user ID and password from IT in email – please have this information ready for the first day. |       |
| [ ]  | Email employee a list of resources, including website addresses needed, contacts on/off campus, other resources, priorities, and/or projects upon hire. |       |
| [ ]  | Contact [**Marketing and University Communication**](http://www.uwgb.edu/univcomm/services/business-cards.asp)**s** to order business cards (if applicable).  |       |
| [ ]  | Order uniform (if applicable). |       |

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| **FIRST DAY** |  |
| [ ]   | Introduce new employee to the staff and their roles. |       |
| [ ]   | Explain workflow for the work area, work priorities, phone usage, mail system, supply orders, photocopying, office equipment, and online [**Directory**](http://www.uwgb.edu/directory/) (Verify new employee’s information is correct--email **HR** if any updates are necessary). |       |
| [ ]   | Inform new employee of work hour/schedule expectations, when to take lunch or breaks, dress code, unit coverage, and who to call in an unexpected absence. |       |
| [ ]   | Train new employee on use of [**timesheets**](https://uwservice.wisconsin.edu/help/time-absence/#for-employees) and/or leave time reporting. Explain [pay schedule](https://www.uwgb.edu/human-resources/payroll/payroll-information/) and [direct deposit.](https://uwservice.wisconsin.edu/docs/publications/dd-setup.pdf)   |       |
| [ ]   | Ensure personal information has been completed within the [**My UW Portal**](http://my.uwgb.edu/) ([**Direct Deposit**](https://uwservice.wisconsin.edu/docs/publications/dd-setup.pdf)**,** [**W-4 Withholding Form**](https://uwservice.wisconsin.edu/docs/publications/pay-update-federal-state-w4.pdf)**,** [**Self-Identification & Emergency Contact**](http://www.uwgb.edu/UWGBCMS/media/hr/forms/Self-ID.pdf?ext=.pdf) **Information**). |       |
| [ ]  | Ensure new employee has completed page 1 of the I-9 Form within HireRight and physically presents acceptable document(s) with designated I-9 verifier.  |       |
| *Help employee arrange for the following (if applicable):* |  |
| [ ]   | [**DUO Access**](https://uknowit.uwgb.edu/page.php?id=97142) Obtain DUO access. |       |
| [ ]   | [**University ID Card**](http://www.uwgb.edu/union/id/)(University Union Ticketing & Information Center) |       |
| [ ]  | Name Badge - Contact [**Marketing and University Communication**](https://www.uwgb.edu/marketing-and-university-communication/request-services/name-badges/)**s** to order a name badge (if applicable).  |  |
| [ ]   | [**Parking Permit**](https://www.uwgb.edu/public-safety/parking-pass-virtual-permit/permit-rates/) (If not electing payroll deduction, purchase at Student Billing Services) |       |
| [ ]   | [**UWGB Vehicle Use Agreement**](http://www.uwgb.edu/risk-management/operation-of-vehicle-on-university-business/driver-authorization/) |       |
| [ ]   | [**Purchasing Card**](https://www.uwgb.edu/purchasing/purchasing-card/) |       |
| [ ]   | [**Corporate/Travel Credit Card**](http://www.uwgb.edu/controller/travel/)  |       |
| **FIRST WEEK** |  |
| [ ]  | Ensure new employee reviews the [**Employee Handbook**](http://www.uwgb.edu/UWGBCMS/media/hr/policies/Employee-Handbook-FINAL.pdf?ext=.pdf). |       |
| [ ]  | Ensure new employee reviews benefits information (will be emailed from UW-System HR) and attends a [benefits orientation](https://www.wisconsin.edu/ohrwd/benefits/benefits-orientations/) (if applicable). |       |
| [ ]  | Explain expectations for acceptable performance, how performance is evaluated, and work priorities. |       |
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| **FIRST MONTH** |  |
| [ ]  | Introduce new employee to staff **external** to the unit with whom they will work. |       |
| [ ]  | Review [**travel**](https://www.uwgb.edu/controller/travel/) procedures (if applicable). |       |
| [ ]   | Ensure new employee reviews the [**New Employee Onboarding**](http://www.uwgb.edu/onboarding) website. |       |
| [ ]  | Ensure new employee completes [**Required Online Training**](http://www.uwgb.edu/human-resources/learning-development/required-training/)within 30 days. |       |
| [ ]  | Ensure new employee reviews the[**Employee Handbook**](http://www.uwgb.edu/UWGBCMS/media/hr/policies/Employee-Handbook-FINAL.pdf?ext=.pdf). After review, a signed Employee Acknowledgement (last page of Handbook) needs to be returned to HR. |       |
| [ ]  | Ensure new employee attends HR Orientation – scheduled by HR (if applicable).  |       |
| [ ]  | Review appropriate governance group. Discuss options for committee membership and how new employee can identify interest in serving on campus/department committees.**•** [**Academic Staff Governance**](http://www.uwgb.edu/sofas/) **•** [**University Staff Governance**](http://www.uwgb.edu/univstaffgov/) |       |
| [ ]  | Discuss options for committee membership and how new employee can identify interest in serving on campus/department committees (if applicable). |       |
| **ONGOING** |  |
| [ ]  | Follow up with new employee on any questions or concerns they may have. |       |
| [ ]  | Schedule training or workshops that will support performance (e.g., [**IT workshops**](https://www.uwgb.edu/it/student-resources/linkedin-learning/)**)**. Discuss how the new employee can request funds for professional development. |       |
| [ ]  | Ongoing University Staff (Non-Exempt) Only: Complete 3-month [**Performance** **Evaluation**](https://www.uwgb.edu/UWGBCMS/media/hr/forms/UniversityStaffPerformanceReviewNonExempt.docx?ext=.docx)with new employee, and return the signed evaluation to HR. |       |
| [ ]  | Ongoing University Staff (Non-Exempt) Only: Complete 6-month [**Performance** **Evaluation**](https://www.uwgb.edu/UWGBCMS/media/hr/forms/UniversityStaffPerformanceReviewNonExempt.docx?ext=.docx)with new employee, and return the signed evaluation to HR. |       |
| [ ]  | Ongoing University (Exempt), Academic, and Limited Staff Only: Complete a 6-month [**Performance Evaluation**](https://www.uwgb.edu/UWGBCMS/media/hr/forms/PerformanceEvalExempt.docx?ext=.docx) with new employee, and return the signed evaluation to HR. |       |
| [ ]  | If new employee is a supervisor, ensure that they attend the annual Supervising for Success: Effective Management for the UW-Green Bay Workforce training. |       |
| [ ]  | Encourage the new employee to attend campus activities. |       |
| [ ]  | Complete and sign this checklist, and send to HR. |       |
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| **ONBOARDING PLAN ACKNOWLEDGMENT** |
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| *Employee Signature* |  | *Date* |
|  |  |  |
| *Supervisor Signature* |  | *Date* |

***Please sign, date, and keep in your departmental files.***