



New Staff Onboarding

EMPLOYEE INFORMATION

Name: _____ Start date: _____
 Position: _____ Supervisor: _____
 Dept. Head: _____ Dept. Admin: _____

PRIOR TO ARRIVAL

- Arrange for any workflow path assignments and/or university system access (Wiki, eBay, etc) (Dept)
- Contact (name) about introductions and onboarding schedule (Department Admin, Grad Program Coordinator, other staff). (Dept)
- Arrange for keys, office assignment, department signage, phone, department directory, and listservs. (Dept)
- Contact IT Consultant to obtain access to departmental shared drives, copier and printing codes, and computer equipment. (Dept)
- Request copy of employee personnel file if transferring from UI department. (HR)
- Send welcome information email to employees email address that was listed on their application: (Dept)
 - Provide employee with UI transportation information: [Cambus](#), [Biking](#), [Parking](#), [Rideshare](#), [U-PASS](#), [University Vehicles](#)
 - Provide employee with HawkID and email address; remind the they are required to use their UI email address for all University business
 - Remind employee to bring required documentation to complete their I-9 on the first day of employment
 - Remind employee to bring direct deposit information
 - Give employee information about dress code expectations, if any
 - Give employee directions on what time to arrive on the first day, where to report, and their "First Day Schedule"
- Send departmental email to introduce new staff member (Dept)

FIRST DAY INFORMATION, INTRODUCTIONS, AND TOURS

- Give introductions to department staff and key personnel during tour (may assign designee). (Dept)
- Complete or update I-9 (HR or Dept)
- Verify with employee they are signed up for benefits orientation (if applicable) (HR)
- Facility information, including: (Dept)
 - [Classrooms](#)
 - [Shared meeting spaces](#)
 - Restrooms/showers/lockers
 - Workroom: Copier, fax, supplies, kitchenette, shared printers, mail location.
 - Vending machines and [campus dining locations](#)
 - [UI recreational facilities](#)

FIRST WEEK

- Provide employee with link to the [CLAS Strategic Plan](#) (Dept)
- Provide employee with link to the Departmental and [CLAS Webpage](#) (Dept)
- Provide employee with link to the [Operations Manual](#) (HR)
- Provide employee with link to the [Staff Handbook](#) (HR)
- Review Employee Self Service (HR)
 - Setting up [Two-Step Login/Duo Mobile](#)
 - Be sure to review important links on the Personal tab (W4, Direct Deposit, Campus Address, Information Release Form, Emergency Contacts etc)
 - Provide employee with copy of position description (located in the ePersonnel file).
- Review offer letter and addendum information details (HR)
- [Get employee ID card/badge](#) (Dept)
- Provide information about calendar/email on [mobile devices](#) (Dept)
- Give any departmental "swag" (Dept)
- Review systems employee will utilize and request access as needed (MAUI, ProView, Max, shared drives, HR transactions, Center for Advancement , etc) (Dept)
- Provide employee with copier codes and set up printers (Dept)
- Provide employee with departmental org chart and explain various roles (Dept)

POLICIES TO REVIEW OR REFER

- Review key policies. (HR)
 - Rate of pay/monthly distribution amount
 - Direct Deposit (pay, spending acct, travel)
 - [Vacation and sick leave](#) (conversion, [holidays](#), accruals, absence request, recording/submitting)
 - [Spending Accounts](#) process/insurance cards
 - [FMLA](#)/leaves of absence/jury duty/family caregiving leave
 - [Performance review](#) process
- [University Operations Manual](#)
 - [Conflicts of Commitment & Interest](#)
 - [Confidentiality](#)
 - [Anti-harassment](#)
 - [Anti-retaliation](#)
 - [Drug Free Environment](#)
 - [Political Activity Guidelines](#)
 - [Prohibition on Giving & Receiving Gifts](#)
 - [Violence](#)
 - [Human Rights Policy](#)
 - [Non-discrimination Policy](#)
 - [Extreme Weather Protocol](#)
- [Acceptable Use of IT resources](#)

ADMINISTRATIVE POLICIES & PROCEDURES

- Review general departmental administrative procedures. (Dept)
- Review HR Website (HR)
- Shipping (FedEx, DHL, and UPS)
- Purchase requests
- Custodial services, general maintenance, employee responsibilities
- [UI Printing](#)
- Emergency procedures, [hawk alerts](#)
- Academic Technology
- How to use phone system, voice mail, [personal calls](#)
- Room reservations (classroom and conference rooms)
- Travel polices: Requests, [Insurance](#), fleet services, expense
- Classroom food/drink policy
- [Building hours/afterhours access](#)
- Parking: locations, request, Transit, Campus, public transit, 30 min loading, accessibility

COMPLIANCES (Specifics to be determined by role)

- Review required training and continuing education opportunities. (HR & Dept)
- [Harassment Prevention Training](#)
- Bloodborne Pathogens (BBP), if applicable
- Lab Safety training, if applicable
- Cash Handling training, if applicable
- Compliance system, other position specific requirements (procurement card, etc.)
- [FERPA](#) online staff with access to student records
- [Security Awareness](#) online for technology staff
- [Ethics and Responsibilities](#) recommended all staff
- [Citi Training](#) for research staff with human subjects
- Unconscious Bias Training
- [eCOI Disclosure](#) required for grant personnel

INFORMATION TECHNOLOGY

- Specifics to be addressed CLAS-IT: (Dept)
- Email
- [Office 365 / Microsoft Office](#)
- [Skype for Business](#)
- Network drives
- [Eduroam \(UI Wireless\)](#)
- [Internet access off campus](#)

PROFESSIONAL DEVELOPMENT

- [Learning and Development](#) opportunities (HR)
- [Quick Coach/Lynda](#) learning opportunities (HR)
- [CLAS Training & Development](#) (HR)
- [CLAS Awards & Recognition](#) (HR)
- [CLAS Staff Council Resources](#) (HR)

Once completed, the Checklist should be added to the employee's e-personnel file by HR