



## Transfer 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](#)
  - Remind the they are required to use their UI email address for all University business
  - If there is a break in service, remind employee to bring required documentation to complete their I-9 on the first day of employment
  - 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
  - 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,, Bongo, Cambus, 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\***