**New Hire Employee Orientation Checklist**

Template

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| **New Employee Name** |  | **Start Date** |  |
| **Employee Position** |  | **Department** |  |
| **Supervisor** |  | **Administrative Support** |  |

**Instructions**: This checklist is to assist supervisors in orienting new employees. Customize the template to reflect your department. Please review the checklist with your employee. Provide a copy of the checklist to the employee. Once reviewed, please keep checklist in your department’s Managers file. **The goal is to complete tasks within the first month of employment.** Any questions, please contact the Human Resources Department at [hr@uwp.edu](mailto:hr@uwp.edu) or Ext. 2204.

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| **Pre-Arrival** | | **Who is Responsible** |
| * Reach out to CTS to set up **DUO Training** <https://uwparkside.qualtrics.com/jfe/form/SV_8f5zulaaWax6ABL> * **Ensure email is set-up and working.** * Confirm **accounts** are setup (email, SOLAR, ImageNow, shared drive, Workflow Queue, EMAS). For email, FERPA must be completed prior to SOLAR account activation at: <https://www.uwp.edu/live/offices/registrarsoffice/ferpa/> * Schedule a **welcome lunch/meeting** on calendar with department staff. * **Work area** is equipped and ready for new employee. * Schedule custodial staff to clean up office. * All equipment, desk, chair, and office supplies are in order. * **TechBar:** ensure desktop and/or laptop are in order, call (262) 595-2444, [servicedesk@uwp.edu](mailto:servicedesk@uwp.edu) * Arrange for **office phone** to be activated – Chris Almond, Ext. 2629. * Arrange for **building keys** – Employee signs “Master Key Agreement” form. * Keys provided by Police Department: <https://uwparkside.qualtrics.com/jfe/form/SV_7WFRO3ee96ffmrH> | | Supervisor and/or ADA/Support Person |
| * **Relocation.** If applicable, relocation policy and procedure is reviewed with the employee. Contact: Alyssa Tortoraitis, Regional Travel Manager, [amahn@uwsa.edu](mailto:amahn@uwsa.edu) | | Supervisor and/or ADA/Support Person |
| * Employee must certify paperwork with HR:   + Employee should respond to HIRERIGHT emails – I9 & Criminal Background Check within 1-3 days.   + Verify I-9 and forms of ID   + Update Personal Information on [MyUWPortal](https://my.wisconsin.edu/web/expanded) | * Employee Data Sheet through BP Logix at [BPLogix Login](https://fs.uwp.edu/adfs/ls/?SAMLRequest=fZJNb9swDIb%2FiqFDb%2F6I47SpFmfImhYN0A8jznbYpZBluhUgS6oopcm%2Fn%2BXsozu0N4og%2BT4vqQWyXhq68u5FbeHVA7posy7JE%2FCmmM2zNj6%2FuORx0XTzuJmxaZzPZ7zhBW%2FytiDRD7AotCpJnmQk2iB62Ch0TLkhleVZnF3G02w3KWhR0HyaTCbTnyRaDypCMTd2vjhnkKZph4l%2FMwm0PmVth6nElEQ32nIY4UrSMYkQRCqGKPbwN1NZ7TTX8ptQrVDPJfFWUc1QIFWsB6SO03p1f0cHSNqcipDe7nZVXD3WOxKtEMEGmiut0Pdga7B7weH79u4fX4BrjNTP4pAocGmI1FNYX8LQHL4Ghe11XT0%2B1Nfl5Iz15osPY48GyvFlgQ1GTnFXjth70YJ9GBg%2FliHRoZcK6Xinz62Z33sgy0WopuM57Lv%2Bz9vZny2Q5Ucwi%2FTd4JOKoYF%2Fs660FPwYraTUb1eDVTd4ctYP50mXp7b%2Ff9nyFw%3D%3D&RelayState=aa2254ac-83e1-4966-a09c-e7422f2286a1) * Sign off on contract offer letter * Review any outstanding paperwork | ADA/Support Person follow up with HR to ensure all paperwork has been completed at [hr@uwp.edu](mailto:hr@uwp.edu) |

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| **Pre-Arrival** | **Who is Responsible** |
| * Contact new employee prior to start date to **answer last minute questions** they may have (i.e. identify dress code, indicate where/when employee should arrive on their first day, etc.). * Send employee temporary parking pass prior to arrival. | Supervisor and/or ADA/Support Person |
| **First Day and/or Week** | **Who is Responsible** |
| * **Login BP Logix to ensure connection with UWP account at** [BPLogix Login](https://fs.uwp.edu/adfs/ls/?SAMLRequest=fZJNb9swDIb%2FiqFDb%2F6I47SpFmfImhYN0A8jznbYpZBluhUgS6oopcm%2Fn%2BXsozu0N4og%2BT4vqQWyXhq68u5FbeHVA7posy7JE%2FCmmM2zNj6%2FuORx0XTzuJmxaZzPZ7zhBW%2FytiDRD7AotCpJnmQk2iB62Ch0TLkhleVZnF3G02w3KWhR0HyaTCbTnyRaDypCMTd2vjhnkKZph4l%2FMwm0PmVth6nElEQ32nIY4UrSMYkQRCqGKPbwN1NZ7TTX8ptQrVDPJfFWUc1QIFWsB6SO03p1f0cHSNqcipDe7nZVXD3WOxKtEMEGmiut0Pdga7B7weH79u4fX4BrjNTP4pAocGmI1FNYX8LQHL4Ghe11XT0%2B1Nfl5Iz15osPY48GyvFlgQ1GTnFXjth70YJ9GBg%2FliHRoZcK6Xinz62Z33sgy0WopuM57Lv%2Bz9vZny2Q5Ucwi%2FTd4JOKoYF%2Fs660FPwYraTUb1eDVTd4ctYP50mXp7b%2Ff9nyFw%3D%3D&RelayState=aa2254ac-83e1-4966-a09c-e7422f2286a1) * Complete Direct Deposit and W-4 forms on [My UW Portal](https://my.wisconsin.edu/web/expanded) and click on the Payroll Information tile. | Human Resources at [hr@uwp.edu](mailto:hr@uwp.edu) or Ext. 2204 |
| * **Benefits/Payroll Orientation**   + Review timesheets and/or leave time reporting.   + Login in [My UW Portal](https://my.wisconsin.edu/web/expanded)   + Payroll processes and how to access <https://my.wisconsin.edu>   + Payroll schedule: <https://uwservice.wisconsin.edu/docs/publications/2022-biweekly-payroll-calendar.pdf> | **UW Shared Services** will reach out to the Employee.  Questions on Benefits email: [Serviceoperations@uwss.wiconsin.edu](mailto:Serviceoperations@uwss.wiconsin.edu)  Question on Payroll: [payroll@uwss.wisonsin.edu](mailto:payroll@uwss.wisonsin.edu) |
| * Meet with the Supervisor at designated time assigned by ADA or Supervisor. * **Show the new employee to their working area.** * **Introduce** new employee to the office staff and their roles. * Provide a **tour** of the office – Identify location of supplies, mailboxes, restrooms, break areas, etc. * Explain **work procedures** – hours of work and Overtime, breaks, meal periods, call-in procedures, etc. * Identify **job expectations** and **responsibilities**. Review position description and evaluation process. * Request staff to add employee to **office e-mail lists** and **provide access to office calendars**. Have new employee add staff to email lists and grant calendar access to staff. * Identify **building hours** and after hour access procedures. * **HR will reach out to the employee to schedule** a time to attend **New Employee Orientation.** * Explain use and location of **office equipment** (fax, copier, shredder, printers, etc.), **Code for copier at** [copiermanagement@uwp.edu](mailto:copiermanagement@uwp.edu) * Identify mission and goals of the department. * How does the Supervisor like to be communicated in case of emergency (text, call, email) * Register: ***Ranger Alert*** at: [www.uwp.edu/explore/offices/safety/rangeralert.cfm](http://www.uwp.edu/explore/offices/safety/rangeralert.cfm) | Supervisor and/or ADA/Support Person |

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| **First Day and/or Week** | **Who is Responsible** |
| * **Arrange for Authorizations** *(****if applicable****):* * **Driver Authorization Form** - The form must be completed and submitted before an employee is authorized to drive a University vehicle, rent a vehicle, or receive mileage reimbursement on a personal vehicle. * Click link below “Vehicle Use Agreement Sign-up Site/ Wisconsin Fleet Portal” at <https://www.uwp.edu/explore/offices/safety/vehprog.cfm> | Bob Grieshaber, Safety and Risk Management, Tallent Hall 188, Ext. 2262 |
| * **Business Cards –** requested from Creative Services at [creativeservices@uwp.edu](mailto:creativeservices@uwp.edu). * Supervisor discuss **emergency procedures:** The *Campus Safety-Guidance for Students and Personnel* can be downloaded at: [Campus Safety - Guidance for Students and Employees](https://www.uwp.edu/live/offices/universitypolice/upload/emergency_guidance_for_students_and_personnel.pdf) * **Police Department:** Employee signs off on keys and parking permit. |  |
| **First Month** | **Who is Responsible** |

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| **Business Services: Tallent Hall, Room 245** | Supervisor/ADA/Support Person schedule trainings if the new hire will be using these services. |
| * **Travel -** Alyssa Totoraitis, Regional Travel Manager, Ext. 2154, [amahn@uwsa.edu](mailto:amahn@uwsa.edu) or [travel@uwp.edu](mailto:travel@uwp.edu) |
| * **ShopUW+ Training -** <https://p2p.wisc.edu/> * **Procurement Card** **(ProCard)** - complete the online Purchasing Card Application and User Agreement at: <https://www.wisconsin.edu/financial-administration/special-topics/purchasing-cards/> * Should you require to make purchases with the ProCard as your duties, you must complete the online Purchasing Card and User Agreement training. In addition, complete Purchasing Card Canvas session. * **Corporate Travel Card -** (for employees who travel). To apply for a US Bank Corporate Travel card, complete the online application which can be found at: <https://www.wisconsin.edu/financial-administration/us-bank-travel-card/> * Monica Litterer, Procurement Specialist, [litterer@uwp.edu](mailto:litterer@uwp.edu), Ext. 2248. |
| * **WISER Training and Accounting** * Jennifer Agerholm, Campus Accountant, [agerholm@uwp.edu](mailto:agerholm@uwp.edu), Ext. 2782. * Meredith Maseman, Financial Manager, [maseman@uwp.edu](mailto:maseman@uwp.edu), Ext 2608. |
| * **Accounts Receivable,** Non-Student, Meredith Maseman, Financial Manager, [maseman@uwp.edu](mailto:maseman@uwp.edu), Ext 2608. * **Accounts Payable,** [ap.office@uwp.edu](mailto:ap.office@uwp.edu) |

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| **First Month** | **Who is Responsible** |

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| * **E-Reimbursement –** Alyssa Totoraitis, Regional Travel Manager, Ext. 2154, [amahn@uwsa.edu](mailto:amahn@uwsa.edu) or [travel@uwp.edu](mailto:travel@uwp.edu) | Supervisor/ADA/Support Person schedule trainings if the new hire will be using these services. |
| * **Budget Training *(only applies to Management)*** * Kathryn Mustell-Watkins, Budget & Policy Analyst, [watkinsk@uwp.edu](mailto:watkinsk@uwp.edu), Ext. 2579. |
| * Schedule a **professional photo** with Creative Services website, WYLL D242. Below is the link to schedule:   <http://creative.uwp.edu/product/headshots>   * Reach out to **Admissions to schedule a** **tour of campus** with the Campus Ambassador, Ext. 2355 or [admissions@uwp.edu](mailto:admissions@uwp.edu) | Supervisor/ADA/Support Person |
| * **Complete the following Mandatory Training**    + **MANDATORY TRAINING FOR SUPERVISORS:**   + Mandated Reporter – required only once   + Sexual Harassment (Title IX) – required every three years   + Information Security – required annually   + FERPA – Reach out to Dawn Sargent to set up at [bogardus@uwp.edu](mailto:bogardus@uwp.edu)   + **MANDATORY TRAINING FOR NON-SUPERVISORS:**   + Mandated Reporter – required only once   + Sexual Harassment (Title IX) – required every three years   + Information Security – required annually | The New Hire Employee will receive an email from Shared Services to complete. Note: check junk or spam email to ensure received. If did not receive within 7-10 days, please reach out to HR Training and Development at [hr@uwp.edu](mailto:hr@uwp.edu). |
| * **New Employee Hire Orientation** * Read the Employee Handbook and complete the acknowledge form and email to [hr@uwp.edu](mailto:hr@uwp.edu)   [Employee Handbook and Acknowledgement](https://www.uwp.edu/explore/offices/humanresources/emphandbook.cfm) | Human Resources will reach out to the New Hire Employee to schedule. |

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| **For Supervisor Use: People to connect with on campus** | |
| **Name, Department & Expectations** |  |
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