**New Hire Employee Orientation Checklist**

Template

|  |  |  |  |
| --- | --- | --- | --- |
| **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 or Ext. 2204.

|  |  |
| --- | --- |
|  **Pre-Arrival** | **Who is Responsible** |
| * Discuss Covid-19 protocols and review Ranger Restart website <https://www.uwp.edu/rangerrestart/>
* 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
* 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.
 | Tina Radley, Business Services at radley@uwp.edu or Ext. 2932 |
| * Communicate to the employee to 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
 | * 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 other paperwork outstanding paperwork
 | ADA/Support Person followup with HR to ensure all paperwork has been completed at hr@uwp.edu  |
|  **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)
* Login to BP Logix - Complete Direct Deposit and W-4 forms in BP Logix.
 | Human Resources at hr@uwp.edu or Ext. 2204 |
| * **Benefits/Payroll Orientation**
	+ Review timesheets and/or leave time reporting.
	+ Login in MyUW Portal
	+ 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.eduQuestion on Payroll: 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
* Identify mission and goals of the department.
* **Cell phone Usage:**  How would 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 |

|  |  |
| --- | --- |
| **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.
* Accompany employee to get **UWP ID Card at Cashiers Office.**
* 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** |

|  |  |
| --- | --- |
| **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 or 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, Ext. 2248.
 |
| * **WISER Training and Accounting**
* Jennifer Agerholm, Campus Accountant, agerholm@uwp.edu, Ext. 2782.
* Christine Knox, Accountant, knoxc@uwp.edu, Ext. 2759.
 |
| * **Accounts Receivable,** Non-Student, Christine Knox, Accountant, knoxc@uwp.edu, Ext. 2759.
* **Accounts Payable,** ap.office@uwp.edu; Tina Radley, Financial Specialist, radley@uwp.edu, Ext. 2932.
* Renee Kelly, Financial Specialist-Senior, kellyr@uwp.edu, Ext. 2255.
 |

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

|  |  |
| --- | --- |
| * **E-Reimbursement –** Tina Radley, Financial Specialist-Advanced, Ext. 2932, radley@uwp.edu
 | Supervisor/ADA/Support Person schedule trainings if the new hire will be using these services. |
| * **Budget Training**
* Kathryn Mustell-Watkins, Budget & Policy Analyst, 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
 | Supervisor/ADA/Support Person |
| * **Complete the following Mandatory Training**
	+ **MANDATORY TRAINING FOR SUPERVISORS:**
	+ Mandated Reporter
	+ Sexual Harassment (Title IX)
	+ Information Security
	+ FERPA – Reach out to Dawn Sargent to set up at bogardus@uwp.edu
	+ **MANDATORY TRAINING FOR NON-SUPERVISORS:**
	+ Mandated Reporter
	+ Sexual Harassment (Title IX)
	+ Information Security
 | 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. |
| * **New Employee Hire Orientation**
* Read the Employee Handbook and complete the acknowledge form and email to 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. |

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