**This handbook has been compiled to assist all managers and supervisors in navigating the onboarding process with their new employees. You play a critical role in how well your new employee settles in to working at Western. The planning and effort you put into their onboarding experience greatly impacts your new employee's productivity, customer service quality, workplace safety and future hiring success. Please use this guide as a starting point to plan for your employee’s first several weeks with you, and help them get off to a great start!**

# Included in this guide:

1. [Planning Ahead](#_Planning_ahead:)
2. [Onboarding Timeline Overview](#_Onboarding_Timeline_Overview:)
3. [New Hire Checklist](#_New_Hire_Checklist:)
4. [Your employee’s new hire requirements](#_Your_employee’s_new)
5. [Resources for your new employee](#_Resources_for_your)
6. [Professional Development Needs Assessment tool](#_Professional_Development_Training)

## 1. Planning ahead:

When planning the onboarding of a new employee, it is suggested the first few days or first week be dedicated to onboarding and training activities.

Onboarding is most successful when a new employee is paired with a mentor. The mentor can be a co-worker, manager, department contact, or other individual who can help the new employee navigate their first few months at WWU.

## 2. Onboarding Timeline Overview:

### Before the First Day

* Stay in contact to reiterate your excitement about their arrival
* Ensure they have completed all of their New Hire Paperwork, including their [Form I-9](https://wp.wwu.edu/hr/2016/01/08/i-9-form/)
* Identify account needs and confirm account creations
* Create an agenda for your new employee’s first week
* Create a comfortable work station for your new staff member
* Schedule time on your calendar to meet with and orient your new hire
* Send your new hire helpful resources, such as parking information and campus maps

### On the first day

* Set aside time for them to attend their mandatory [QuickStart orientation](https://wp.wwu.edu/hr/2015/09/03/813/)
* Take them to lunch, coffee, or a walk around campus
* Provide a tour of their workspace (ensure they are acquainted with the closest restroom facilities, [food locations](https://wwu.campusdish.com/en), etc.)
* Provide time to watch the mandatory [welcome videos](https://www.youtube.com/playlist?list=PL98zNPVeQdIUvY8gnqac6ekhDNMSfioqV) and settle in
* Make initial introductions-who can they ask for help?

### During the First Week

* Meet to discuss the [Professional Development Needs Assessment Tool](#_Professional_Development_Training)
* Make time to check in with your new employee
* Cover important work processes
* Facilitate introductions and/or meetings with key players

### The First 30-90 Days

* Identify training needs using the [Professional Development Needs Assessment tool](#_6._Professional_Development)
* Assist in making job title peer connections
* Build in opportunities for feedback and check-in
* Complete mandatory probationary performance evaluation (for Classified Staff)
* Prioritize their attendance of the mandatory [New Employee Orientation](https://wp.wwu.edu/hr/2015/09/03/813/)

## 3. New Hire Checklist:

Use the list below to identify what your employee may need your help setting up. You may need to add items based on your employee’s specific job needs.

### Accounts and Contact information

* P-Drive access ([ATUS](https://wwuhelp.atlassian.net/servicedesk/customer/portal/1/group/-1))
* Add to Group email distribution list ([ATUS](https://wwuhelp.atlassian.net/servicedesk/customer/portal/1/group/-1))
* Share mailstop number with employee/establish mailbox
* Phone and voicemail setup ([request service](https://esign.wwu.edu/?deptID=1012))
* Set up Universal login ([directions for setup](https://atus.wwu.edu/accounts-passwords-and-access))
* Add to department directory/website contacts
* What other account access will your new hire need?

### Business and logistics Needs

* [Key(s) assigned](https://cpb-us-e1.wpmucdn.com/wp.wwu.edu/dist/9/130/files/2018/09/Keys-and-Access-Handy-Hints-1satza6.pdf)
* [Badge requested](https://westerncard.wwu.edu/badges-nametags/)
* Business cards ([Print & Copy Services](https://www.wwu.edu/bservices/pcs/index.shtml))
* Copier code ([Print & Copy Services](https://www.wwu.edu/bservices/pcs/index.shtml))
* Nameplate request ([Facilities Management](https://www.fm.wwu.edu/facilities-maintenance-operations/requesting-fm-services/))
* [Wireless stipend](https://www.wwu.edu/bservices/purchasing/cellphones.shtml)
* Complete crucial introductions
* Convey department/building norms (cleaning, shared space, etc.)
* What other needs will exist for your department and/or this position?

## 4. Your employee’s new hire requirements

The following are requirements your new employee will need to complete as part of the hiring process. This is being provided for your information, only. If they have any questions about any of these requirements they should contact HR.

During this time, new hires are also completing tasks on their Onboarding Portal Tasklist, including setting up direct deposit, updating emergency contact information, W-4, Measles Acknowledgment Forms, and choosing retirement and healthcare plans.

### On the first day, new employees must:

(Optional: I-9 completion 8 business days before start date. Important Note: we cannot require that in-person tasks occur before the start date, but if the I-9 completion can happen before starting, it will streamline account creation and ensure a smoother start.)

* Ensure that [I-9](https://www.uscis.gov/i-9) has been completed. Your employee cannot report to work without an I-9 on file at HR
* Attend mandatory [QuickStart training](https://wp.wwu.edu/hr/2015/09/03/813/) (QuickStart is offered every week on Monday, if start date is a different weekday, they will attend the next Monday)
* Watch [welcome videos](https://www.youtube.com/playlist?list=PL98zNPVeQdIUvY8gnqac6ekhDNMSfioqV) (full series is 90 minutes; new permanent staff are only required to watch the 9-minute safety video since the rest of the content is covered in orientation)

### During the first week, New Employees must:

* Complete required online sexual harassment training: EO office will assign and email employee; employee should complete within one week of receipt
* Review applicable bargaining agreement or handbook ([Classified](https://wp.wwu.edu/hr/2015/08/11/union-information/), [Professional](https://wp.wwu.edu/hr/2015/09/02/professional-staff-handbook/), [Faculty](https://wp.wwu.edu/hr/2015/09/02/ufww/))

### In the first 30+ days, new Employees must:

* Attend [New Employee Orientation](https://wp.wwu.edu/hr/2015/09/03/813/) (optional for temporary staff and Faculty; Permanent Faculty have their own orientation each Fall)
* Submit benefits paperwork to HR, if benefits eligible (live 1:1 benefits consultations can be scheduled with HR)
* Complete [in-person sexual harassment training](http://www.wwu.edu/eoo/training.shtml) (optional for temporary employees, must be completed within 6 months of hire for permanent employees)

## 5. Resources for your new employee

This section contains information which may assist your new employee in settling in. Please feel free to share this information with them, or have them contact their Onboarding Specialist if they need more guidance.

* [Relocation information](https://wp.wwu.edu/hr/new-employee/relocation-resources/)
* [Parking information](http://www.wwu.edu/parking/)
* [Alternative transportation](http://www.wwu.edu/transportation/)
* [Setting up a Universal Account](https://atus.wwu.edu/accounts-passwords-and-access)
* [Timesheet User Guide](https://wp.wwu.edu/hr/2015/09/01/my-time-sheet-2/)
* Bargained agreements and handbooks ([Classified](https://wp.wwu.edu/hr/2015/08/11/union-information/), [Professional](https://wp.wwu.edu/hr/2015/09/02/professional-staff-handbook/), [Faculty](https://wp.wwu.edu/hr/2015/09/02/ufww/))

## 6. Professional Development Needs Assessment Tool

Use the following list to identify key competencies your new employee will need to excel at their job, and then talk with them during their first week to determine which individualized training needs exist.

As a supervisor, you can suggest specific trainings to your employees in the [Training Portal](https://westernwashington.pageuppeople.com/learning/23) where you will find training resources contributed by many campus affiliates. See the [PageUp Supervisor guide](https://www.wwu.edu/hrdocs/pageup-lms/guide-for-supervisors.pdf) for help with this.

Each training has the online source or contact person listed or linked. If any class is not currently open for enrollment, contact the course creator to request 1:1 training.

### Budget management and/or purchasing authority

* Chart of account FOAPAL Training ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Millennium FAST Finance Training ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Millennium FAST Finance Training – Experienced User ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Submitting Contracts Online ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Approving Contracts Online in CMM ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Traveler and Delegate Training – Concur ([Travel Desk](https://www.wwu.edu/bservices/travel/index.shtml))
* Western Marketplace Drop-in Advising ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Budget Office one-on-one orientations (email Carrie.Thurman@wwu.edu)

### Systems, Software, Permissions

* Banner ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Microsoft 365 Suite ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Qualtrics ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* PageUp Recruiting ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* PageUp Learning one-on-one orientation (email HR.Training@wwu.edu)
* Google Suite (contact [ATUS](https://atus.wwu.edu/kb/g-suite-western))

### Cash Handling

* Cash Handling (email Becky.Kellow@wwu.edu – Manager, Treasury Services)

### Compliance/Mandatory Training for New Employees

* [Sexual Harassment Prevention Training](http://www.wwu.edu/eoo/training.shtml), online (Required for all new employees, info will also be emailed to new hire)
* Sexual Harassment Prevention Training, in-person (Required for all permanent employees, schedule at [training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* [New Employee Welcome Videos](https://www.youtube.com/playlist?list=PL98zNPVeQdIUvY8gnqac6ekhDNMSfioqV) (day one)
* New Employee QuickStart Orientation (first week)
* Live New Employee Orientation (first 30 days)
* For Supervisors Only: Mandatory Supervisor Training, STAR (supervisor training and resources, [training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))

### Diversity, Equity and Inclusion

* Any role-specific need ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/) or email HR.training@wwu.edu for requests)

### Policy and Handbook REview

* [Classified Staff Contracts](https://wp.wwu.edu/hr/2015/08/11/union-information/)
* [Professional Staff Handbook](https://wp.wwu.edu/hr/2015/09/02/professional-staff-handbook/)
* [Faculty Handbook](https://wp.wwu.edu/hr/2015/09/02/ufww/)

### Environmental Health and Safety

* Safety training (contact directly at ehs@wwu.edu and view options at [training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))

### Supervisory positions

* [PageUp Supervisor User Guides](https://www.wwu.edu/hrdocs/pageup-lms/guide-for-supervisors.pdf)
* STAR Mandatory Supervisor Training ([training.wwu.edu](https://westernwashington.pageuppeople.com/learning/))
* Read labor contracts, staff handbooks, etc. ([Classified](https://wp.wwu.edu/hr/2015/08/11/union-information/), [Professional](https://wp.wwu.edu/hr/2015/09/02/professional-staff-handbook/), [Faculty](https://wp.wwu.edu/hr/2015/09/02/ufww/))
* [Request Payroll Approver Permissions](https://cpb-us-e1.wpmucdn.com/wp.wwu.edu/dist/6/45/files/2015/11/RequestingPayrollApproverPermissions-1c054xj.pdf)

### Position-specific skills

(See position description for help populating this section)