



UW System Administration Onboarding Checklist

Pre-Employment

Pre-Employment		
Supervisor Responsibilities		Departmental Responsibilities
Required	Recommended	
<input type="checkbox"/> Complete PAF		
<input type="checkbox"/> Send welcome letter		<input type="checkbox"/> Offer letter (UWSHR) <input type="checkbox"/> Benefits letter (UWSHR)
<input type="checkbox"/> Schedule meeting with HR <input type="checkbox"/> Schedule meeting with Benefits	<input type="checkbox"/> Schedule introductory meeting <input type="checkbox"/> Schedule meeting with OIS/DoIT <input type="checkbox"/> Schedule time to get a Wiscard <input type="checkbox"/> Schedule meetings with other key departmental people	<input type="checkbox"/> Send Criminal Background Check (CBC) (UWSHR)
<input type="checkbox"/> Ensure building access is provided as necessary: <ul style="list-style-type: none"> o Joyce Jackson for Van Hise access o Bill Utzig for 780 Regent St. 	<input type="checkbox"/> Obtain a parking pass (if the new hire will be driving their vehicle) <ul style="list-style-type: none"> o Diana Trendt for Van Hise access o for Service Center (660 W. Wash) access o Freddie Endres for 780 Regent St. 	<input type="checkbox"/> Enter in HRS (once DOB & SSN can be obtained from CBC) (UWSHR)
<input type="checkbox"/> Fill out the New Employee Computer Equipment form <input type="checkbox"/> Networks assigned to department are automatically set up. Tickets must be submitted for additional drives.	<input type="checkbox"/> Notify your department of the new hire <ul style="list-style-type: none"> <input type="checkbox"/> Include start date, what their job will be, and employee bio <input type="checkbox"/> Send via email to department 	<input type="checkbox"/> Note: Email address & network access given once in HRS (OIS)
<input type="checkbox"/> If at Service Center, fill out software request form if applicable (List of software & how to request access can be found the Tools & Setup tab)	<input type="checkbox"/> Clean work area, stock with basic supplies & make welcome sign	
<input type="checkbox"/> Arrange phone installation (Work with the Authorized User in your department.)	<input type="checkbox"/> Update relevant distribution lists, directories, org charts, etc.	
<input type="checkbox"/> If network access needs to be more than default – contact the Helpdesk	<input type="checkbox"/> HRS/SFS/WISDM Access	

First Week

Keep in mind they may be nervous; don't overwhelm them; have regular communication

First Week		
Supervisor Responsibilities		Departmental Responsibilities
Required	Recommended	
<input type="checkbox"/> Email Helpdesk to set up Duo MFA Enrollment (2nd	<input type="checkbox"/> Review Onboarding Website (Still being developed)	<input type="checkbox"/> Collect forms (UWSHR): <ul style="list-style-type: none"> o W4 o I-9 (within 3 days) o Direct deposit o Parking forms (if appropriate)
<input type="checkbox"/> Provide overview of: <ul style="list-style-type: none"> o UWSA o Department/Team o Org charts 	<input type="checkbox"/> Make aware of: <ul style="list-style-type: none"> o Resources such as phone lists, office supplies o Professional development options 	



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<ul style="list-style-type: none"> ○ Discuss employee needs <input type="checkbox"/> Share safety procedures/policies: <ul style="list-style-type: none"> ○ Continuity of Operations (COOP) ○ WiscAlerts – UW Police ○ Evacuation Plan 	<ul style="list-style-type: none"> ○ Computer network drives, shared files, etc. <input type="checkbox"/> Provide an orientation to the physical space including exits, stairs, break areas, etc.	<input type="checkbox"/> Schedule benefits orientation (UWSHR)
<input type="checkbox"/> Ensure they get a Wiscard (this is their employee ID) Note: driver's license is necessary to get ID	<input type="checkbox"/> Introduce to frequent contacts in addition to immediate co-workers	
<input type="checkbox"/> Provide & review information on: <ul style="list-style-type: none"> ○ UWSA Employee Site ○ EAP (Password: SOWI) ○ Ergonomics worksite consultation ○ Disability Services ○ Vehicle and Travel Policy ○ Workplace Conduct Expectations (WE3) ○ My UW Portal ○ Phone usage (local vs. long distance) 	<input type="checkbox"/> Provide a photo for the UWSA profile photo directory	Inform employee of procedures under which personal information may be withheld from OpenBook Wisconsin disclosure
<input type="checkbox"/> Document performance goals; discuss & schedule midcycle probationary/evaluation performance review	<input type="checkbox"/> Provide information on: <ul style="list-style-type: none"> ○ Employee Online Directory ○ Employee Wellness Program/Recreation ○ Wiscard perks 	
<input type="checkbox"/> Review terms of employment (university staff vs. academic vs. limited)	<input type="checkbox"/> Discuss current department projects and cyclical programs, highlighting roles of other department members	
<input type="checkbox"/>	<input type="checkbox"/> Discuss leave procedures, overtime, time reporting procedures, etc.	

Ongoing

Remember that onboarding is an ongoing effort. It is important to continue to have conversations with your new employees. Things to continue to discuss may include:

<input type="checkbox"/> Identify and provide resources needed to succeed
<input type="checkbox"/> Discuss process for performance reviews
<input type="checkbox"/> Review performance standards, expectations and competencies
<input type="checkbox"/> Provide continuous feedback
<input type="checkbox"/> Seek employee input regarding their needs and understand how you can help them succeed.
<input type="checkbox"/> Identify short-term goals (1-6 months)
<input type="checkbox"/> Identify long-term goals (annual)
<input type="checkbox"/> Identify opportunities for professional development