This internal working document outlines the steps for UWSA’s recruitment process, from pre-search stage approvals through to pre-boarding a new employee. Human Resources, [Talent Management Team](https://www.wisconsin.edu/uwsa/hr/hr-services-and-support/performance/) (TMT )and the hiring manager will work collaboratively throughout the process.

Note: the department/unit onboarding liaison should be engaged for some steps as requested/assigned by the hiring manager. Likewise, additional staff from UWSHR will be engaged in some steps as needed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Pre-recruitment / Pre-Search** | | | | |
| **Responsible** | | **Activity** | **Notes, Resources, and Links** |  |
| **Hiring**  **Dept** | **UWS**  **HR** |
| **X** |  | Department identifies a vacant position that needs to be filled | Hiring Manager reaches out to Human Resources, [Talent Management Team](https://www.wisconsin.edu/uwsa/hr/hr-services-and-support/performance/) to discuss options to fill the vacancy |  |
| **X** | **X** | Begin intake process | * Begin strategic intake process: asking questions, understanding staffing; justification; complete job requisition form * Document duties, job duties, discuss position of trust responsibilities, minimum & preferred qualifications, physical work location, * Document equipment, systems, training needs (utilize Appendices A-D) * Develop a general recruitment timeline, sourcing   opportunities, etc. |  |
|  | **X** | Verify standard job description, FLSA status, and  compensation range | Internal consultation to TTC/compensation structures;  communicate any concerns/changes to department |  |
|  | **X** | Verify position & ongoing budget available with Fin  Admin/Budget & Planning | Communicate any concerns/changes to department |  |
|  | **X** | Complete job requisition form and route for approval | Route via TAM or DocuSign for approval |  |
|  | **X** | [CHRO] Recruitment decision communicated to HR | If not approved, HR & Hiring Manager should continue strategic discussion on how to address needs within the current staffing. |  |
|  | **X** | If approved, notify Hiring Manager, internal partners & staff with next steps | * Use Recruitments & Hires Notification Group to include IT, Capital Planning, Fin Admin, Budget & Planning, and HR staff. * Notify Hiring Manager & remind them to reach out to IT and Capital Planning to request space and IT equipment (if applicable). |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **X** |  | Hiring Manager/onboarding liaison completes the following:   * Submit equipment requests with IT * Submit space planning form to Capital Planning | **IT:** submit equipment request now and confirm employee information when hired.  **For Madison-based employees:** notify Capital Planning & Administrative Services.  **For non-Madison-based employees:** notify the point of contact for  physical UW location. |  |
| **Recruitment / Search** | | | | |
| **Responsible** | | **Activity** | **Notes, Resources, and Links** |  |
| **Hiring**  **Dept** | **UWS**  **HR** |
|  | **X** | Publish announcement | TAM entry; post to advertising locations; UW web |  |
| **X** | **X** | Identify Search & Screen (S&S) committee members and interview panel members | Hiring Manager is **not** a member of the S&S committee, hiring manager should **not** be involved in all the hiring steps. |  |
| **X** | **X** | Charge the S&S committee, train on implicit bias, and develop timeline for screening, prelim, and final interviews | S&S members to keep their notes as personal notes (not shared); and all personal notes destroyed at the end of the process.   * HR provides to S&S the job description, announcement, etc. * Hiring Manager shares what the ideal candidate might look like.   HR contact identifies what the next steps are.   * HR provided access to candidate materials through TAM |  |
| **Screen** | | | | |
| **Responsible** | | **Activity** | **Notes, Resources, and Links** |  |
| **Hiring**  **Dept** | **UWS**  **HR** |
|  | **X** | S&S review candidates for minimum qualifications (and  preferred qualifications) | S&S will identify candidates who move on to the next step of the process, prelim interviews or final, depending on the size of the pool   * Hiring department or HR schedules prelim interviews * Keep in mind if we need to make any accommodations for prelim and/or final interviews |  |
|  | **X** | S&S committee conducts **prelim interviews** (if applicable, second step of screening) usually held virtually. | HR provides a pool of interview questions for S&S to select from and HR approves the final questions for the interviews. |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **X** | **X** | S&S Identify finalists to move forward to a final interview. Notify HRSP & MGR. Schedule  interviews. | Notify HR who has been identified as a finalist, by name only in no order via email.   * Hiring department or HR schedules prelim interviews |  |
| **X** | **X** | Interview Panel develop **finalist interview** questions with the Hiring Manager | * Hiring Manager considers what has already been asked. * HR provides a pool of interview questions. * Final interview questions need to be approved by HR. |  |
| **X** |  | Conduct final interviews | Post interview discussion and select candidate to check reference checks.   * Notify HR who you would like to proceed with reference checks and HR will start the reference check process. |  |
|  | **X** | Check references | HR conducts reference checks   * If successful, HR will let hiring manager know they can proceed with a verbal offer contingent upon successful completion of cbc/shrc. |  |
| **Offer Stage / Selection** | | | | |
| **Responsible** | | **Activity** | **Notes, Resources, and Links** |  |
| **Hiring**  **Dept** | **UWS**  **HR** |
| **X** | **X** | Develop verbal offer- your offer must fall within the posted salary range. | You will need to work with HR when figuring out an offer and determine equity issues, etc. |  |
| **X** |  | Extend verbal offer contingent upon successful completion of CBC/SHRC & negotiate start date, etc. | Hiring manager must communicate to candidate:   * For start date, consider minimum business days needed (15 total) to prep for new EE start once offer letter is signed and prep work for IT. IT needs 10 business days and HR needs five days. Direct any FMLA/special accommodations requests to Derek Allen. |  |
|  | **X** | Verbal offer accepted - initiate CBC/SHRC (through TAM) | Initiate CBC/SHRC (ensure running the correct type) – start date may be delayed if cbc/shrc is not completed. |  |
|  | **X** | Enter offer in TAM and route for approval through TAM to accept/approve offer. | Enter new employee into HRS (auto-creates email  address overnight & EMPL ID) initiate/create rejection letters. |  |
| **X** | **X** | Prepare offer letter & wait for offer to be approved in TAM. When approved send out offer letter to the selected candidate via email, cc Derek Allen - Instructions sent along to complete I-9 with Derek Allen with offer letter. | Offer letter contingent upon successful completion of CBC/SHRC. Instructions in the email letting the new employee to contact DA withing first three business days to complete I-9. |  |
|  | **X** | HR received signed offer letter from candidate and completes the hire in TAM, double check cbc/shrc has flowed over from HireRight/BP logics. Derek Allen manages the process in HireRight and BP logics. Derek will track and adjudicate as necessary when received. | HR sends out sorry letters to those who did not move on the interviews.   * Sends hiring manager a copy of the signed letter and cc DA * HR completes IT New Hire Form then forwards it to the Recruitment and Hire Notification email dist. list * If hire was not made through TAM send an announcement regarding new hire and signed / approved PAF to the email distribution list. |  |
| **X** |  | Hiring Manager calls the finalist who were not selected, thanks them for their time and lets them know someone else was hired | Hiring Manager notifies staff /department regarding new hire and logistics |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Post-selection / Pre-boarding** | | | | |
| **Responsible** | | **Activity** | **Notes, Resources, and Links** |  |
| **Hiring**  **Dept** | **UWS**  **HR** |
|  | **X** | For new employees transferring from other state agencies  or UW institutions, arrange for the transfer of the electronic personnel file |  |  |
| **X** |  | Hiring Manager should have received an email regarding a service ticket from IT that HR started.  Submit access requests for other systems and schedule related training. | Complete the service ticket asap and request platforms, phone equipment, etc. for your new employee.   * Appointment with IT on-site; or   IT to ship the equipment & connect virtually to deploy.  Update relevant distribution lists, email groups, directories etc. |  |
| **X** | **X** | Partner to develop onboarding plan utilizing the activities in this section. | If not already done during intake discussions, utilize Appendices A- D to identify needs. Plan should be completed before sending the Welcome Letter to the new employee and hiring manager should  consider including the first week’s activities with the letter. |  |
|  | **X** | Assign the UWSA Ambassador and coordinate time for  introduction | Indicate in welcome letter who UWSA Ambassador is |  |
| **X** |  | Schedule / plan time on the new employee calendar for  mandatory training to be completed. The new employee has 30 days to complete their mandated trainings. | Some assigned automatically through Shared Services. Information Security, Sexual Harassment; Title IX, and mandated reporter. Student appointments are not assigned Title IX |  |
| **X** |  | Notify Capital Planning of successful hire; cleanup workspace; etc. | **For non-Madison-based employees:** notify the point of contact for physical UW location. |  |
| **X** |  | Arrange building access (fobs, keys, etc.) | **For non-Madison-based employees:** notify the point of contact for  physical UW location. |  |
| **X** |  | Arrange parking (pass, sticker, etc.) | **For non-Madison-based employees:** notify the point of contact for  physical UW location. |  |
| **X** |  | Submit access requests for other systems and schedule related training | See Appendix A |  |
| **X** |  | Schedule check-ins with manager for first day & ongoing | See Appendix C for details |  |
| **X** |  | Schedule meetings with team, key staff, and partners | See Appendix B |  |
| **X** |  | Schedule check-ins with onboarding liaison or someone to cover the following (coordinate with campus as needed)   * Parking & building access * Building tour * Resources, equipment, supplies, network, other needs * Assist in obtaining a WISCard and NetID |  |  |
| **X** |  | Schedule relevant on-the-job shadowing and required  training | See Appendix A |  |
| **X** | **X** | Finalize the customized onboarding plan |  |  |
| **X** | **X** | Complete the welcome letter template, any pertinent  information needed prior to the start date, and send to the new employee, cc hiring manager and onboarding liaison | See Appendix D.  The goal is to send this information to the employee 5 business days prior to start date. |  |
| **X** |  | Make announcements to appropriate teams and groups  about new employee and upcoming start date |  |  |
| **Onboarding Stage:**  **Hiring department implements the onboarding plan** | | | | |

# Appendix A – Systems/Tools: Access and Related Training

What systems and other tools a new employee may require access to depending upon their role and responsibilities; what security or access level is needed; what training and/or job-shadowing should be scheduled for the onboarding plan.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **System / Tool and Links** | **Exec/Dept**  **Assistant** | **Support**  **Staff** | **People**  **Manager** | **Dept**  **Head** | **Executive** |
| BOR Meetings & Committee Software  (Contact Board of Regents Office) | X | Depends on role | Depends on role | Depends on role | Depends on role |
| Cherwell (Shared Services-specific) | Depends on role | Depends on role | Depends on role | Depends on role | Depends on role |
| Computer equipment, network access, email distribution list, drives, multifactor authentication, and standard software\*   * [Help Desk ticket/form](https://www.wisconsin.edu/uwsa/ots-helpdesk/make-a-request/) | X | X | X | X | X |
| Concur / Travel-Wise   * S[ign up](https://www.concursolutions.com/registration/register_form.asp?regcode=C01W73FWTCT) * [Travel & Expense General Policy-H](https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/travel-and-expense-general-travel-expense-policy/) | X | Depends on role | X | X | X |
| HRS Access (TAM, BI Reports, Time & Labor Approvals, etc.) All Departments (except for UWSS) email Derek Allen for provisions requests.   * [Provisioning Requests](mailto:derek.allen@uwss.wisconsin.edu) * [Learning Path](https://uwservice.wisconsin.edu/professionaldevelopment/learning-path/) * [HRS Course Catalog](https://uwservice.wisconsin.edu/professionaldevelopment/) | Depends on role | Depends on role | Depends on role | Depends on role | Depends on role |
| Memberships (unique to department/unit) | Depends on  role | Depends on  role | Depends on  role | Depends on  role | Depends on  role |
| [MyUW Portal](http://my.wisconsin.edu/)   * [Help Documents](https://uwservice.wisconsin.edu/myuw/) | X | X | X | X | X |
| Obtain a [Wiscard (creates a NetID) – Your Key to Campus Life](https://wiscard.wisc.edu/) at Union South | X | X | X | X | X |
| Personal Vehicle Use & Fleet Vehicle Authorization (Risk Management)   * [Policy & Other Information](https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/vehicle-use-and-driver-authorization/#policy) * [Agreement](https://www.wisconsin.edu/risk-management/vehicle-use-and-driver-authorization-pages-by-institution/) | Depends on role | Depends on role | Depends on role | Depends on role | Depends on role |
| Pro-Card   * [Contact](mailto:cardadmin@uwsa.edu) * [Information](https://www.wisconsin.edu/financial-administration/special-topics/purchasing-cards/) | Depends on role | Depends on role | X | X | X |
| Procurement Training (email below)   * [procurement@uwss.wi](mailto:jdwyer@uwsa.edu)sconsin.edu * [Information](https://www.wisconsin.edu/procurement/uwsa-procurement-basics/) | X | Depends on role | X | X | X |
| Safety / COOP Roles | Depends on  role | Depends on  role | x | x | x |
| Shared Financial System (SFS)   * [Request Access](mailto:uwsaproblemsolvers@uwsa.edu) * [Information](https://www.wisconsin.edu/sfs/download/sfs_9.2_upgrade/9.2_docs_and_training/9.2_general_processes/Introduction-and-Navigation-Reference.pdf) * [Training](https://www.wisconsin.edu/sfs/sfs-9-2-training/) | Depends on role | Depends on role | X | X | X |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **System / Tool and Links** | **Exec/Dept**  **Assistant** | **Support**  **Staff** | **People**  **Manager** | **Dept**  **Head** | **Executive** |
| Shared Outlook calendars and e-mailboxes  for department/unit | X | X | X | X | X |
| Telephone equipment, voicemail access. Indicate whether phone # exists or is new   * **Requires separate** [Help Desk](https://www.wisconsin.edu/uwsa/ots-helpdesk/make-a-request/) [ticket/form](https://www.wisconsin.edu/uwsa/ots-helpdesk/make-a-request/) from computer request | X | X | X | X | X |
| Website Content / Zuse   * [Request access](mailto:webteam@uwss.wisconsin.edu) & setup training | Depends on role | Depends on role | Depends on role | Depends on role | Depends on role |
| WISER   * [Request Access](mailto:uwsaproblemsolvers@uwsa.edu) * [Information](https://www.wisconsin.edu/sfs/download/reporting/TheBasics.docx) * [Training](https://www.wisconsin.edu/sfs/reporting/wisdm-and-wiser/#wiser-training-materials) | Depends on role | Depends on role | X | X | X |

\*Standard software includes Microsoft Office, VPN, multiple internet browsers, Adobe products, Cisco Jabber, Webex, and Teams.   
  
Appendix B – Meetings with Individuals or Groups

Depending upon the new employee’s role and responsibilities, it may be advantageous to schedule meetings with individuals or groups as a part of the personalized onboarding experience. Use the following chart to determine which meetings should be considered. Recommendations by employee type are included in the columns on the right.

|  |  |  |  |
| --- | --- | --- | --- |
| **Individuals or Groups** | **Staff**  **Member** | **People**  **Manager** | **Executive** |
| Manager | X | X |  |
| Onboarding Liaison | X | X | X |
| Team members or group meetings | X | X | X |
| Within the unit/department: | | | |
| * Key Staff | X | X | X |
| * Other leaders | Depends on  role | X | X |
| * Support Staff | Depends on role | X | X |
| * Direct reports |  | X | X |
| Key staff and partners in other UWSA units/departments | X | X | X |
| Leaders in other UWSA units/departments | Depends on  role | X | X |
| Key staff, partners, and leaders at UW Institutions | Depends on role | Depends on role | Listening Tour/Sessions |
| Partners outside of the organization | Depends on  role | Depends on  role | X |
| Executive Leadership Members |  | Depends on  role | X |
| UW President |  | Depends on  role | X |
| Board of Regents Members |  |  | X |

The Listening Tour or Sessions provide an opportunity for new executives to meet with UW System Institution colleagues and other executive leadership members in a more intimate forum to learn and understand the priorities, strengths, challenges, and other operational items from the institution’s perspective. This forum also provides the new executive to communicate their background, ideas, and other agenda items directly to the institution.

# Appendix C – Manager’s Communication Responsibilities

The new employee’s manager will schedule periodic check-ins with the new employee over the first six months: day 1, weeks 1-4 and months 2, 3, 4, 6.

The day one meeting should include the following topics:

* Review onboarding plan
* Role, responsibilities, and position description
* Review terms of employment (university/academic/limited/student)
  + Work hours
  + Attendance, breaks, lunch periods
  + Introductory period (if applicable)
  + Performance expectations
  + Leave procedures, overtime, time reporting
* Workplace / remote work expectations
* Dress code expectations
* Departmental overview
  + Role within the organization, mission, vision
  + Members and their roles within the department
* Departmental projects and cyclical programs

The following topics can be covered in the subsequent meetings:

* Develop/review SMART goals
* Discuss professional development opportunities
* Performance feedback throughout introductory period
* Introductory period evaluation at month 2 or 3 and again at 6 months – work with the HR Strategic Partner to identify how to transition from the introductory period into the regular performance cycle

# Appendix D – Information Sharing with New Employee (in advance of or on Start Date)

Depending on the new employee’s role and responsibilities, it may be necessary to share additional information (outside of logistics and other standard, preboarding items) in advance of or on the first day.

Use the following chart to consider what may be pertinent to communicate early. Recommendations are included in the columns on the right:

|  |  |  |  |
| --- | --- | --- | --- |
| **Topics / Items** | **People**  **Manager** | **Dept.**  **Head\*** | **Executive\*** |
| Organizational charts | As needed | X | X |
| Unit/department information | As needed | X | X |
| High priority items to be addresses in first days/weeks/months | As needed | X | X |
| Project information | As needed | X | X |
| UW System Background, Mission, Data and Other Information |  | Depends on  role | X |
| Board of Regents Information |  | Depends on  role | X |
| UWSA Information |  | Depends on role | X |
| Systemwide Processes |  | Depends on  role | X |
| UW System Institution Information |  |  | X |
| Higher Learning Commission |  |  | X |
| State Government |  |  | X |

While onboarding for all new employees should be customized and meaningful, onboarding for a new department heads (AVPs, Executive Directors,) and executives (VPs & President) requires special attention and may require collaboration across several teams or departments including the involvement of UWSHR. Planning should start early in the process.