## CHECKLIST FOR NEWLY HIRED CLASSIFIED AND PROFESSIONAL STAFF

## (Employees and managers of the academic medical centers – please contact your Human Resource department for new employee guidelines.)

**For Newly Hired Employees**

Review the following list with your supervisor or departmental administrator. Some of the information will be needed to sign up for UW benefits

**Action Items**

* Find out your Employee Identification Number (EID): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Find out your Employment Program: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
see: http://www.washington.edu/admin/hr/roles/ee/index.html
* Complete the Affirmative Action Data form at:
https://prp.admin.washington.edu/AffirmativeAction/
(Form provides essential information Benefits Office needs to complete employee retirement plan enrollment)
* Find out if your department has signed you up for early e-mail
* Sign up for New Employee Orientation and Benefits Orientation– go to
* Seattle Campus: <http://www.washington.edu/admin/hr/roles/newee/orient/areas/seattle/staff.html>
* Bothell Campus: <http://www.washington.edu/admin/hr/roles/newee/orient/areas/bothell/staff.html>
* Tacoma Campus: <http://www.washington.edu/admin/hr/roles/newee/orient/areas/tacoma/staff.html>

Be sure to enroll in benefits programs within 31 days of start date.

* For Seattle Campus employees: Register for Sexual Harassment Prevention class at: http://www.washington.edu/admin/hr/roles/newee/orient/sexharassprevent-trng.html

**Review Items** – For discussion with your supervisor and/or departmental manager or administrator

* Terms and conditions of employment (employment program/probationary period/salary)
* Job duties and performance expectations
* Performance appraisals
* Work schedules, breaks, and overtime
* Time and leave reporting
* Labor contract / dues obligation (if applicable) or Professional Staff Program for professional staff.
* Paydays and how to arrange direct deposit
* Types of leave and leave accrual rates
* Requesting time off
* Function of department/organizational chart
* Interrelationships with other departments
* Building use and access/security
* Departmental Safety Plan
* Equipment use and access
* Telephone use/etiquette/voicemail/directory
* E-mail account and usage tips
* Emergency contact information
* Inclement weather procedures/policies

**For Administrators and Employing Officials**

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ EID Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employment Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employment Program: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Employees and managers at UW Medical and Harborview Medical Center – please contact your Human Resource department for new employee requirements.)

### Supervisor/Departmental Responsibilities

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| **Human Resources items*** Send appointment letter to new employee
* Process the Online Payroll Update System (OPUS) action to appoint the employee
* Create OWLS record if your department is using the Online Work Leave System or 220 forms if your department does not use OWLS
* New Employee Orientation - Direct the new employee to the New Employee UW Human Resource Page at: http://www.washington.edu/admin/hr/roles/newee/index.html
	+ Instruct the employee to register for the New Employee and Benefits orientations.
	+ Ensure signup for required Prevention of Sexual Harassment Training.
* Affirmative Action Data Form -- Confidential Information. New employee should complete the online form:
	+ http://www.washington.edu/provost/ap/eoaa/aadf.html (NOTE: accessing the online Affirmative Action Data Form requires that the employee have a UWNetID)
	+ If the information cannot be entered into the online system by the employee, the form can be downloaded from http://www.washington.edu/admin/eoo/forms/paper1325.pdf. The new employee completes form 1325 and mails the original form to the Equal Opportunity Office, Box 354560.
* Ensure that the employee registers for a prevention of sexual harassment class at:
	+ http://www.washington.edu/admin/hr/pod/newemp/prevent-sexharasstrng.html
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| **General Work Information - Review/Discuss the following items*** Job description, job duties, performance expectations and performance review requirements.
* Terms of appointment: Employment program, probationary or trial period if any, salary.
* Work schedule: Hours of work, breaks, meal periods, absence reporting.
* Vacation and sick leave accrual.
* Vacation and sick leave request and use procedures including how to request leave use.
* Labor contract coverage if applicable.
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| **Email Access for Employees*** If new employees are already on OPUS, they can go to the UW Information Technology website https://uwnetid.washington.edu/newid/ to create their UWNetID, which sets up their email account
* If new employees are not on OPUS, the new hire coordinator can use the Email Access for Employees website https://prp.admin.washington.edu/emailaccess. After this step is completed, the new employees follow the instructions listed above
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| **UPASS Information**http://www.washington.edu/commuterservices/programs/upass/ * Issue keys (office, building, desk, and file cabinets) and building use permits
* Add employee to electronic building access locking system database (Proxy card)
* Discuss department security and emergency procedures and review Health and Safety checklist with new employees
* Issue UW equipment such as laptops, cell phones, pagers, software, or other tools, if applicable. Review equipment use policies and appropriate use of University equipment.
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| **Access to communications**See http://www.washington.edu/itconnect/phones/ for items listed below* Long distance services
* voice mail
* pagers
* cell phones
* Other - List
* Add to departmental and centrally managed email lists
* Discuss location of computer files and policies for computer use
* Set up access to network directories and electronic calendar. For the Nebula network, complete this form: https://www.washington.edu/itconnect/wares/nebula/forms/index.cgi
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| **Access to Payroll and OPUS*** For Access to the Payroll Systems (OPUS, Time Reporting ETRs/PTRs, UW Timesheet, etc), please contact your unit’s ASTRA Authorizers.
* To add individuals to the pronline Payroll “Systems” mailing list, email pronline@u.washington.edu
* To add individuals to the payroll “General Questions” mailing list, email payroll@u.washington.edu
* For training on the Payroll Systems, email pronline@uw.edu with name, PUC, and systems requesting training for.
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| **Keynes Access and SecurID card** * Complete the Administrative Systems Access Form for access to the following on-line administrative systems: Budget (BGT), Communications (COM), Financial (FIN), Payroll/Personnel (HEPPS), Purchasing (PAS) and Stores (STR). Transferring employees will need to obtain a new SecurID card and reapply for access.  The application form is available at:
	+ http://www.washington.edu/itconnect/work/administrative-systems/access-forms-for-keynes-u-washington-edu-systems/
* Questions? Email info@cac.washington.edu, call (206) 543-5970, ext 4
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| **ProCurement Card or Reconciler Account Access** * The ProCurement card application is available at:
	+ <http://f2.washington.edu/fm/ps/how-to-buy/procard>
* If the employee is transferring from another department, a new card must be applied for with the new department.
* For additional questions, call the ProCurement Card hotline at (206) 543-5252
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| **UW Travel Card*** UW Travel Card information is available at:
	+ <http://f2.washington.edu/fm/ps/corporate-travel-services/individual-travel-cards>

For more information, call (206) 543-7171  |
| **Access to Petty Cash funds*** If the employee is a petty cash custodian, notify Payables Administration at apcsvc@u.washington.edu or (206) 543-4500
* If the employee is an authorized signer, contact the bank to update the signature card
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| **Records retrieval authorization (UW Records Management Office)*** Send an email to urc@u.washington.edu
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| **Access to OASIS (Equipment Inventory System)** * Email eio@u.washington.edu and include the employee’s name, UWNetID, and org codes
* For additional questions, see <http://oasis.cac.washington.edu/>
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| **Access to UW Development Advance** * Complete the Advance Login/Confidentiality form located in the Information Management section at:
	+ https://depts.washington.edu/uwadv/data-technology-resources/advance/
* Sign up for the Basic Advance Inquiry class by sending an email to devhelp@u.washington.edu
* For additional questions, call the Development Help Desk at (206) 221-3947
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If you are hiring an individual who will be located out of state, see also the checklist for out of state workers at: www.washington.edu/admin/hr/forms/employment/chklsts/ee-outofstate.doc

**Note:** If you find that any of this information is outdated, please contact uwhr@u.washington.edu.