Department Checklist for New Staff Members

The impression a new staff member forms in the first days of employment often influences their overall attitude about the university, the department, and the supervisor, setting the tone for the staff member's tenure with the college.

This checklist is a guideline to help supervisors and other colleagues make a new staff member's first few days positive and productive by providing reminders of important things to consider as you onboard your new employee into their role within your department.

Pages 1 and 2 of this document are for supervisor reference only. The remaining orientation checklist should be shared with your new staff member, so they know what information, processes, and procedures should be covered during their first week with your department.

Tips for Success:

- Prepare a schedule for introducing the new staff member to the university, the department, and the job.
- Be prepared to provide information and answer the kinds of questions a new staff member is likely to have, but don't overwhelm them by packing in too much new information at one time.
- Make time to meet with the new staff member at least every day for the first week—perhaps for fifteen minutes at the end of the day. Make sure they are settling in, answer questions, review job responsibilities, and so on. Let the new staff member know you support them!
- After the first week, consider scheduling a time to meet with the new staff member at least once a week for the first month to check in on progress and questions as they assimilate to their new position.
- Make time for the staff member to attend the university's New Staff Orientation program. This program adds important institutional context to orientation activities occurring within your department.
- Consider inviting the new staff member to lunch on their first day and inviting a few other colleagues.

Before Your New Staff Member Arrives

☐ Send an email or post an announcement for appropriate work groups and key partners about the new staff member's arrival and when to expect them. Give a copy of the announcement to your new staff member on their first day, so they know what has been shared with the team.

☐ Prepare a clean workstation stocked with appropriate resources, supplies, tools, and equipment that your new staff member will need to use beginning their first week.

☐ If applicable: notify the Technology Services Help Desk via email (servicedesk@pugetsound.edu) of specific departmental systems/software requirements, ensure that the computer is up and running, and arrange for the telephone extension and voicemail box to be activated.

☐ Order business cards with Print and Copy Services at copyservices@pugetsound.edu if needed.

☐ Develop an onboarding calendar for the staff member's first month, introducing them to the university, the department, and the job.

☐ Consider inviting another staff member to be the new staff member's peer mentor. This person would take the lead of showing the new person around campus, going to lunch with them the first few days, explaining the University's organization and culture, and—most importantly—answering the many questions all new staff members have.

☐ If appropriate, connect your new employee via email with their peer mentor prior to their start day, so they know who they are once they arrive.

☐ Have a set of desk keys ready; have a key request form for office keys ready.

☐ Arrange for needed key card/swipe access to be added to the staff member's ID card. Ensure the staff member knows prior to their first day that they will be asked to take a photo ID.

☐ Arrange for the new staff member to participate in special orientations (e.g., if the individual will be responsible for financial transactions, they should meet with the Finance liaison).

First Week of Department Orientation

☐ (NonExempt) Review how to log in and clock in/out of PeopleSoft. Talk about the departmental policy for requesting time off and how to input accrued time as needed.

☐ (Exempt) Review how to log in to PeopleSoft. Talk about the departmental policy for requesting time off and how to input accrued time as needed.

☐ Introduce people in the department and to those in other departments with whom your team works regularly.

☐ Review the location of restrooms, lunch facilities, break facilities, fire extinguishers, and first aid kits.

☐ Confirm meal and break periods.

☐ Visit Dining and Event Services to take a Puget Sound identification card picture. (Dining and Event Services is located in Wheelock 240.)

☐ Discuss procedures for registering an automobile, if needed. Parking passes can be initiated through My Puget Sound.

☐ Review the university's mission statement and core values, strategic plan, and educational goals.

☐ Go over important university wide *Staff Policies and Procedures* and where they can be found on the Human Resources website.

☐ Discuss important departmental information, such as the department's purpose, policies/procedures, and organizational chart and departmental emergency procedures.

☐ Talk about recurring and/or scheduled departmental staff meetings and individual meetings with supervisors and/or department heads. Ensure all necessary events are on calendars.

☐ Review supervisory styles, the department's culture, and work cycles. For example: *What do colleagues typically do for lunch? What are the busiest times of year, and when might someone need to work outside of regular business hours? What do typical work days/weeks/months look like? How does management make themselves available for questions? What are the preferred communication methods between team members?*

☐ Define appearance norms for the department, including workspace and personal appearance standards, such as dress or uniform requirements.

☐ Review departmental tardy/absence policy. Identify call-in procedures, including who to call and the phone number in the event of a tardy or absence. Discuss when such calls are expected to be made. *(Be specific about whether text messages or emails may be used to report late arrivals or absences in lieu of voicemails/phone calls.)*

☐ Review departmental safety practices and the location of the university's [Workplace Safety](#) information, the [Emergency Response Management Plan](#) , the university's policy and the Safety and Health Manual in the department.

☐ Discuss the University Emergency Mass Notification System. *(Staff receive emergency Security Alerts via a text message to their personal cell phone and/or university email. Staff can provide or update their cell phone number through myPugetSound. [Visit](#) for more information.)*

☐ Review the Privacy and Appropriate Use of Resources policy (e.g., telephone, e-mail, Web, etc.) and describe department expectations around network resource use.

☐ Go over instructions on how to request additional supplies or equipment as needed.

☐ Review a copy of the position's job description/performance expectations, as well as discuss the six-month initial review period for new staff members, including the informal and formal feedback process for job performance.

☐ Go over the appropriate way to answer the telephone and/or to greet those whom the department serves.

☐ Talk about initial work assignments to be completed. Review expectations on how often to check in about assignments and when/how to elevate questions and/or ask for help.

If applicable, discuss:

☐ Benefits and Eligibility: https://www.pugetsound.edu/human-resources/benefits and how to enroll and login to [Employee Navigator.](#)

☐ Mail services, mail pick-up/delivery times, and the use of FedEx, UPS, and Express mail services

☐ Print and Copy Center services and order forms

☐ [Facilities Service Work Request](#) and procedures

☐ The [university style and inclusive language guide](#) and how to ensure accuracy, clarity, and consistency among campus print and online publications directed to external audiences

☐ The "Non-Disclosure and Confidentiality Agreement" if they will have access to confidential information. This can be printed from the HR web page at:
https://www.pugetsound.edu/human-resources/forms

☐ The Federal Education Rights and Privacy Act (FERPA) if they will have access to student information. The can be accessed at:
https://www.pugetsound.edu/office-university-counsel/policies/campuswide-policies/education-records-policy

☐ Explore MyPugetSound to get familiarized with relevant and helpful sections. For example, all new staff members will be registered for mandatory online courses for hazing, harassment prevention and eliminating campus sexual violence (Title IX), and data security and privacy. (*To see assigned courses, navigate to MyPugetSound, HR-Self Service, and then Compliance Training (KnowBe4 for cyber security). Completion is required within 30 days of starting work. A completion certificate should be printed and returned to a supervisor to be filed for our records.*)

☐ Review professional development opportunities and where to monitor the HR Professional Development web page:
https://www.pugetsound.edu/human-resources/loggers-keep-learning-work .