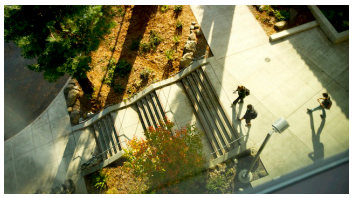
HUMBOLDT STATE UNIVERSITY

Onboarding Checklists

Preparing for a Staff or Management New Hire



Onboarding at Humboldt State University

July 1, 2015

Congratulations on your successful hire.

A dedicated group from multiple departments has developed this onboarding framework to help you help our new employees feel welcomed, engaged, and supported. Onboarding is simply a systematic and comprehensive approach to integrating a new employee with the University and its culture, and providing the new employee the tools and information needed to become a productive member of the campus community.

We know that you, the search committee, and many others have invested substantial time in recruiting, interviewing, and hiring your new employee. We encourage you to close the hiring loop by providing clear guidelines on how to get started, clarifying roles and responsibilities, and explaining how a new employee's position relates to the University's mission of student success. Your continued support, which can be facilitated through a comprehensive onboarding process, can help new hires more quickly feel satisfied and comfortable in their new surroundings, which in turn can assist with retention. Your new hire will appreciate your setting them up on the path to a successful career at Humboldt State University.

Thank you for all you have done and will continue to do to help build a welcoming and vibrant community of faculty, staff, and administrators at Humboldt State University. Human Resources is here to support you throughout the onboarding process. Please let us know your recommendations on providing the best possible onboarding experience for our newest University community members.

Sincerely,
Colleen Mullery
Sr. Associate Vice President
Faculty Affairs and Human Resources

Table of Contents

Onboarding Roles

The goal of the onboarding process is to ensure that the roles noted below are working together in order to establish clear and robust communication, and to promote an effective process. The onboarding processes and terms described in this guide are focused on the Staff and Management hiring process. In order to facilitate and encourage communication, when a checklist item may be completed by more than one role, we have noted which roles may share the responsibility.

Hiring Authority

The Hiring Authority is the person who ultimately makes the hiring decision based on the Form 4 recommendations and makes an offer of employment to the selected candidate based on the approved Form 5 “Offer of Appointment.” The Hiring Authority is commonly the one who phones the employee to make a verbal offer of employment, unless they delegate this to the Appropriate Administrator.

Human Resources & Academic Personnel Services (HRAPS)

HRAPS is the department that oversees the hiring process steps and signs the progression of forms (Forms 1 through 5) to ensure compliance and consistency. HRAPS also acts as a liaison between HSU (specifically, the hiring department) and the employee to inform, educate, and train in matters relating to employment and employee benefits.

Vice President

The Vice President's Office is responsible for completing the final draft of the Appointment Letter and for mailing the Letter to the new employee.

Appropriate Administrator and/or Lead

The Appropriate Administrator is a CSU employee serving as the immediate supervisor or manager of the hired employee, to whom the employee will be accountable. The Appropriate Administrator is further identifiable by being a member of the Management Personnel Plan (MPP) and is not affiliated with any collective bargaining unit.

Lead Workers are members of classified staff who are responsible for duties that include, but are not limited to: giving work assignments to employees; providing on-the-job training for assigned duties; attempting to resolve workflow or procedural conflicts; providing input to the Appropriate Administrator on the employee’s job performance. Lead workers are not responsible for administering discipline or responding to grievances.

Department Contact

When a new employee is recruited, the Hiring Authority may identify a Department Contact to serve as the point of contact for the new employee and to provide support to the new employee’s Appropriate

Administrator and/or Lead. The Department Contact also assists with new employee documentation and monitors the onboarding process on behalf of the department.

The Hiring Authority should communicate with the Department Contact's supervisor, and with the Appropriate Administrator and/or Lead, to establish expectations for this role.

Employee

The Employee may be newly hired ("new-to-HSU") or an existing employee transferring to a new position. The Employee is named on the Form 5 in the "Candidate Recommended" field and the Form 104 HSU Appointment Document.

Payroll

Payroll is the department that enters employee data into PeopleSoft and the State Controller's Office, creating job and pay records.

Buddy (optional)

When a new employee is recruited, the Appropriate Administrator may choose to assign a Buddy to partner with the new employee during their first few weeks on the job. The Buddy's role is to help familiarize the new employee with campus norms and culture.

The Buddy-Employee relationship is casual and informal, and should be tailored to accommodate the level of engagement desired by both parties. It is intended to pair a knowledgeable and motivated employee with an eager new hire to facilitate integration into the HSU community. While primarily responsible for offering advice and guidance regarding the day-to-day aspects of working at HSU, the Buddy may also offer their perspective on myriad campus practices, policies, and culture. At a minimum, the Buddy should be accessible to the new employee (via email or telephone) and be responsive when asked for assistance or guidance.

Hiring Authority Checklist

The Hiring Authority is the person who ultimately makes the hiring decision based on the Form 4 recommendations, and makes an offer of employment to the selected employee based on the completed Form 5 "Offer of Appointment." The Hiring Authority is commonly the one who phones the employee to make a verbal offer, unless they delegate this task to the Appropriate Administrator.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

Employee Information

Name: _____ Supervisor/Lead: _____

Position: _____ Administrator: _____

Start Date: _____ Dept. Contact: _____

Preparing for Appointment

- **Assign a Department Contact**

  When a new employee is recruited, the Hiring Authority may identify a Department Contact to serve as the point of contact for the new employee and to provide support to the new employee's Appropriate Administrator and/or Lead. The Department Contact also assists with new employee documentation and monitors the onboarding process on behalf of the department.

  The Hiring Authority should communicate with the Department Contact's supervisor, and with the Appropriate Administrator and/or Lead, to establish expectations for this role.

  This checklist item may be a shared responsibility between the following roles: Hiring Authority and Appropriate Administrator and/or Lead.

- **Complete Form 5**

  The department should order the Accurate Background Check when submitting the Form 5.

  Form 5 must be approved prior to the job offer. There are two versions of the form that may be used: *'Offer of Appointment - Within 5% of Minimum Range'* *or* *'Request to Vice President to Offer Appointment - Over 5% of Minimum Range.'*

  The Hiring Authority may approve the 'Within 5%' form, and then proceed to the verbal offer. Human Resources & Academic Personnel Services (HRAPS) and VP approval are required for the 'Over 5%' form.

  The Hiring Authority should identify the Department Contact on Form 5, if one has been assigned.

  This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.

- **Offer the position**

The Hiring Authority is responsible for making the verbal offer of employment after *Form 5* has been approved. Critical information must be communicated during the offer conversation to facilitate ongoing communication and to provide HRAPS with necessary details for the Appointment Letter:

- Establish a start date
- Establish salary
- Provide employee with Department Contact information
- Discuss moving reimbursement allowance, if applicable
- Verify employee's preferred e-mail address
- Verify employee's current mailing address
- Explain the significance of the Appointment Letter and discuss the expected timeframe for the Letter's prompt return
- Inform employee of requirement to complete sign-up documents in HRAPS on or before first day of work

- **Provide HRAPS with hire details**

In order to draft the Appointment Letter, HRAPS (david.hickcox@humboldt.edu and nicole.log@humboldt.edu) must be advised of the following details via e-mail:

- Effective start date
- Supervisor/Lead Worker
- Appropriate Administrator
- Moving reimbursement allowance, if applicable
- Salary
- Employee's current mailing address
- Employee's preferred e-mail address

The Hiring Authority should notify the Appropriate Administrator and/or Lead, and the Department Contact when the verbal offer has been accepted and the hire details have been submitted to HRAPS.

This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.

- **Appointment Letter follow-up**

HRAPS notifies the Hiring Authority or proxy and/or the Department Contact when Appointment Letter is signed and returned to HRAPS. The Department Contact may also check in with HRAPS to find out if the Appointment Letter has been received.

If the Appointment Letter has not been returned within the expected timeframe, the Department Contact should consult with the Hiring Authority to determine who will reach out to the new employee for follow-up, and in what format.

This checklist item may be a shared responsibility between the following roles: HRAPS, Hiring Authority and Department Contact.

Human Resources & Academic Personnel Services (HRAPS) Checklist

Human Resources & Academic Personnel Services (HRAPS) is the department that oversees the hiring process steps and signs the progression of forms (Forms 1 through 5) to ensure compliance and consistency. HRAPS also acts as a liaison between HSU (specifically, the hiring department) and the employee to inform, educate, and train in matters relating to employment and employee benefits.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

Employee Information

Name:	_____	Supervisor/Lead:	_____
Position:	_____	Administrator:	_____
Start Date:	_____	Dept. Contact:	_____

Preparing for Appointment

• **Appointment Letter template**	HRAPS sends the Appointment Letter template to the VP's office. These items are included with the Appointment Letter: • Instructions for the employee to follow the link to the Candidate Information Form (http://bit.ly/1sr6ASF) to enter their Social Security number, date of birth, and the job title for their position. The new employee will also need to sign the letter acknowledging the acceptance of the position and returning the letter by scanning and emailing (hsuhr@humboldt.edu) or faxing a copy to HRAPS at 707.826.3625; and returning the original letter to HRAPS. • Confidentiality Statement with instructions to sign and return this form with the signed Appointment Letter: https://forms.humboldt.edu/confidentiality-statement-employees-consultants-and-independent-contractors or for Unit 4 employees: https://forms.humboldt.edu/confidentiality-statement-academic-professionals-unit-4 • Live Scan Form & instructions (if required or if it's not already complete) • I-9 • MPP Outside Employment Disclosure, if applicable • Self-addressed, stamped envelope
• **Notification of Appointment Letter receipt**	HRAPS notifies the Hiring Authority or proxy and/or the Department Contact when Appointment Letter is signed and returned to HRAPS. The Department Contact may also check in with HRAPS to find out if the Appointment Letter has been received.

	If the Appointment Letter has not been returned within the expected timeframe, the Department Contact should consult with the Hiring Authority to determine who will reach out to the new employee for follow-up, and in what format. This checklist item may be a shared responsibility between the following roles: HRAPS, Hiring Authority and Department Contact.
• **Appointment Document**	For recruited-for positions, HRAPS creates an Appointment Document after the Appointment Letter has been signed and returned by new hire.
• **P.O.I.**	HRAPS completes the Person Of Interest process. This creates a P.O.I. record in PeopleSoft which: 1. generates or reactivates an HSU ID # 2. prompts Account Center to create or reactivate an on-campus email address within 24 hours of POI creation Both of these allow a department to begin preparing for the new employee.
• **HSU ID #**	The HSU ID# is created or reactivated as part of the P.O.I. process.

Hiring Documents

• **Sign-up documents**	Before the end of the first day of work, the employee should receive and understand his/her "sign-up" documents. These documents will vary depending on the appointment and are generally completed in the Human Resources & Academic Personnel Services (HRAPS) office in Siemens Hall 212: • Employee Action Request • Employee Information Request • I-9 with documentation • Social Security Card • Confidentiality Form- add HSU ID # • ID Card Request • Direct Deposit • Parking Permit Info Slip • Pay Warrant/Green & Gold Calendar • Union Information - CSUEU Packet; Unit 11 - sign-up sheet • Campus Policies Packet • Benefits/Sign-up Packet & HIPAA • Flex Cash & Dental/Vision Form • CalPERS 801 Form • Form 1083 • Employee: Bring Information about immediate family (spouse and child(ren)) such as legal names, social security numbers, and birthdates. This information may be needed for benefit forms/employee sign-ups. This checklist item may be a shared responsibility between the following roles: Employee and HRAPS.

Welcome and Orientation

• **Position Description**	The Position Description will be sent by HRAPS within one week of the employee's initial hire. The Appropriate Administrator is responsible for reviewing the Position Description with the new employee, collecting appropriate signatures, and returning the signed Position Description to HRAPS. During this Position Description review, the Appropriate Administrator should discuss the probationary period and evaluation criteria. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and HRAPS.
• **Invitation to New Employee Orientation**	The employee will be invited by HRAPS to participate in an Employee Orientation. This checklist item may be a shared responsibility between the following roles: HRAPS and Employee.

Vice President Checklist

The Vice President's Office is responsible for completing the final draft of the Appointment Letter and for mailing the Letter to the new employee.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

Preparing for Appointment

- **Appointment Letter template**

  Human Resources & Academic Personnel Services (HRAPS) sends the Appointment Letter template to the VP's office.

  These items are included with the Appointment Letter:

  - Instructions for the employee to follow the link to the Candidate Information Form (http://bit.ly/1sr6ASF) to enter their Social Security number, date of birth, and the job title for their position. The new employee will also need to sign the letter acknowledging the acceptance of the position and returning the letter by scanning and emailing (hsuhr@humboldt.edu) or faxing a copy to HRAPS at 707.826.3625; and returning the original letter to HRAPS.
  - Confidentiality Statement with instructions to sign and return this form with the signed Appointment Letter: https://forms.humboldt.edu/confidentiality-statement-employees-consultants-and-independent-contractors or for Unit 4 employees: https://forms.humboldt.edu/confidentiality-statement-academic-professionals-unit-4
  - Live Scan Form & instructions (if required or if it's not already complete)
  - I-9
  - MPP Outside Employment Disclosure, if applicable
  - Self-addressed, stamped envelope
  - If appointment is a 10/12 or 11/12, confirm months off
  - If moving expenses have been negotiated, include terms and policy in letter: http://www2.humboldt.edu/accounting/moving_expenses.html

- **Send Appointment Letter**

  The VP's office sends the Appointment Letter to the new employee.

- **Distribute copies of Appointment Letter**

  The VP's office sends copies of the Appointment Letter to:

  - Appropriate Administrator
  - Payroll
  - HRAPS

Appropriate Administrator and/or Lead Checklist

The Appropriate Administrator is a CSU employee serving as the immediate supervisor or manager of the hired employee and to whom the employee will be accountable. The Appropriate Administrator is a member of the Management Personnel Plan (MPP) and not affiliated with any collective bargaining unit.

The Lead Worker is a member of classified staff who is responsible for duties that include, but are not limited to: giving work assignments to employees; providing on-the-job training for assigned duties; attempting to resolve workflow or procedural conflicts; providing input to the Appropriate Administrator on the employee's job performance. Lead Workers are not responsible for administering discipline or responding to grievances.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

Employee Information

Name:	_____	Position:	_____
Start Date:	_____	Supervisor/Lead:	_____
HSU ID #:	_____	Administrator:	_____
User Name:	_____	Dept. Contact:	_____
		Buddy (optional):	_____

Preparing for Appointment

• **Communicate with Department Contact**	When a new employee is recruited, the Hiring Authority may identify a Department Contact to serve as the point of contact for the new employee and to provide support to the new employee's Appropriate Administrator and/or Lead. The Department Contact also assists with new employee documentation and monitors the onboarding process on behalf of the department. The Hiring Authority should communicate with the Department Contact's supervisor, and with the Appropriate Administrator and/or Lead, to establish expectations for this role. This checklist item may be a shared responsibility between the following roles: Hiring Authority and Appropriate Administrator and/or Lead.
• **Assign a Buddy**	The (optional) Buddy role is designated by the Appropriate Administrator, unless delegated to the Lead.
• **Establish contact between**	Ensure that the Buddy and Department Contact each have the other's name and contact information.

Buddy & hiring department	This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, Department Contact, and Buddy.
• **Verify Form 5 completion**	The department should order the Accurate Background Check when submitting the Form 5. Form 5 must be approved prior to the job offer. There are two versions of the form that may be used*: 'Offer of Appointment - Within 5% of Minimum Range' or 'Request to Vice President to Offer Appointment - Over 5% of Minimum Range.'* The Hiring Authority may approve the 'Within 5%' form, and then proceed to the verbal offer. Human Resources & Academic Personnel Services (HRAPS) and VP approval are required for the 'Over 5%' form. The Hiring Authority should identify the Department Contact on Form 5, if one has been assigned. This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.
• **Verify verbal offer and hire details**	Verify that the candidate has received a verbal offer of employment from the Hiring Authority and that the hire details have been submitted to HRAPS (David.hickcox@humboldt.edu and nicole.log@humboldt.edu). In order to draft the Appointment Letter, HRAPS must be advised of the following details: • Effective start date • Supervisor/Lead Worker • Appropriate Administrator • Confirm moving reimbursement allowance, if applicable • Salary • Employee's current mailing address • Employee's preferred e-mail address This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.
• **Appointment Document**	The hiring department creates a *Form 104 - Appointment Document* for all non-recruited for and ongoing temporary appointments (e.g. emergency hire, casual worker, retired annuitant, etc.). HRAPS creates the Appointment Document for recruited-for positions. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

User Account, Access & Services

- **Confirm HSU ID # & User Name**

  Confirm that an HSU ID # and User Name have been created for the new employee. This information is required in order to establish user account settings and services.

  The HSU ID # is created or reactivated in PeopleSoft as part of the POI process. The User Name is created or reactivated in Account Center within 24 hours of POI creation. The Help Desk (826-HELP) can provide this information on request.

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **TNS Service Request**

  Submit a TNS Service Request through your department's Key Advisor to establish telephone, voicemail and network services. The TNS Key Advisor should also send the new employee's Name, Extension, Email, Dept. Location and Title to operations-tns@humboldt.edu to be added to the online campus directory.

  These requests should be submitted as soon as possible, to ensure that TNS services will be available on the employee's first day of work.

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Confidentiality Statement**

  Ensure that the employee's Confidentiality Statement has been signed and routed. Completion of this form is required for the employee to access certain services and systems.

  After the employee, Appropriate Administrator, and VP signatures have been collected, the completed form is sent to the Help Desk (826-HELP) to be logged, then routed to HRAPS for filing.

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Access Request Form (ARF)**

  Submit an Access Request Form to request employee access to Enterprise Systems (OBI, PeopleSoft, etc.), if applicable.

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Establish access to non-ARF systems & services**

  The Appropriate Administrator and/or Lead should determine whether the new employee requires access to any non-ARF systems, services, or files. The Department Contact may assist with securing appropriate access. Access may include both confidential and non-confidential areas, such as:

  - SharePoint sites
  - Department network folders
  - Drupal
  - Mailing Lists
  - Google Groups
  - Calendars (Google or Outlook)
  - Systat notifications
  - Personnel and Student Records

  For information on the CSU's Confidential Access Control policy, see ICSUAM 8060.00 or http://www.calstate.edu/icsuam/documents/Section8000.pdf .

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Notify stakeholders & service providers**

Notify all stakeholders and services providers that a new employee has been hired, and initiate campus processes for successful onboarding across campus. Stakeholders and service providers will vary depending on the hiring department, but may include:

- Information Technology Services
- Marketing & Communications
- Learning Technology Specialists
- Emergency Management
- Facilities Management
- Campus Mailroom

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Notify HRAPS of required training**

Call the Learning Technologist at 826-5716 to discuss and plan for specific department training needs.

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

Department Preparation

- **Moving reimbursement**

If the hiring department has approved reimbursement for relocation expenses, collect all relevant receipts and complete the necessary reimbursement paperwork. The department should work with the new employee to complete the reimbursement process according to HSU's Moving Reimbursement Policy.

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Acquire workstation equipment & office supplies**

Work with ITS Desktop Support to set up a workstation and/or order new IT equipment. Please refer to the Standard Desktop Support Service Level Agreement to ensure that appropriate software/hardware guidelines are followed. Equipment and supplies may include:

- Computer
- Printer
- Software
- Mobile devices
- Headset
- HSU Name Tag
- Business Cards
- General Office Supplies

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Prepare work space**

Work with Facilities Management to prepare the new employee's physical workspace. Space preparation may include:

- Furnishings
- Ergonomic assessment
- Wall painting
- Name plate
- Mounted white boards/bulletin board

	• Floor cleaning or buffing This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Asset management**	Work with the Financial Services Accounting Office to ensure that capitalized property is tagged and accounted for. Policy and procedures for asset management are detailed in the University Property Procedures Manual. For questions about asset management, contact Cynthia Perez (cynthia.perez@humboldt.edu). This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Inform staff and campus of new employee**	Notify department staff and key campus personnel of your new employee's name, title as posted on vacancy announcement, and start date. You may wish to update records or prepare announcements for: • Internal contact lists • Organization charts • Department webpages • myHumboldt Portal • University Notices This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

Welcome and Orientation

• **First-day/first week plan in place**	**On or before first day of work, verify completion of sign-up documents.** Prior to the Employee's arrival, the Appropriate Administrator and/or Lead should create an activity plan for the first day/week of work. This may include a "Learning Plan" that incorporates department-specific training as well as CSU- or HSU-required training.
• **Tour of department and/or campus**	Introduce the new employee to the department and other key areas on campus. • Introduce new desk/work area • Personnel introductions • Phone and voicemail how-to • Common areas (kitchens, lounges, conference rooms, restrooms, etc.) • Emergency Exits and Resources This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Review administrative information**	Review general administrative information, policies & procedures. • Verify completion of sign-up documents • Mail (incoming and outgoing) • Absence and Leave Reporting

	• Department structure • Keys and Access Card usage This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.	• Confidentiality and Access • Purchase Requests
• **Discuss confidentiality & access**	• Turning papers over on desk • Locking computer workstation • Physical security	• ARF access • Data Classification Standards
• **Department-specific training**	The employee's training schedule should be determined by the Appropriate Administrator and/or Lead, and may include department-specific training in addition to required campus training. The Department Contact may assist with ensuring that the new employee understands how to gain access to training, either by special arrangement or through HSU's Training and Professional Development website. Important training may include: • PeopleSoft • OBI • Emergency Preparedness • Moodle • California's Child Abuse and Neglect Reporting Act (CANRA) This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.	• Defensive Driving • Workspace Safety • Harassment Prevention • Avoiding Unconscious Bias • Title IX
• **Alarm codes and panic button**	This checklist item may be a shared responsibility between the following roles: Department Contact, Appropriate Administrator and/or Lead.	
• **Position Description**	The Position Description will be sent by HRAPS within one week of the employee's initial hire. The Appropriate Administrator is responsible for reviewing the Position Description with the new employee, collecting appropriate signatures, and returning the signed Position Description to HRAPS. During this Position Description review, the Appropriate Administrator should discuss the probationary period and evaluation criteria. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and HRAPS.	

Department Contact Checklist

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The Hiring Authority should communicate with the Department Contact's supervisor, and with the Appropriate Administrator and/or Lead, to establish expectations for this role.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

Employee Information

Name:	_____	Position:	_____
Start Date:	_____	Supervisor/Lead:	_____
HSU ID #:	_____	Administrator:	_____
User Name:	_____	Buddy (optional):	_____

Preparing for Appointment

- **Verify Form 5 completion**

  The department should order the Accurate Background Check when submitting the Form 5.

  Form 5 must be approved prior to the job offer. There are two versions of the form that may be used*: 'Offer of Appointment - Within 5% of Minimum Range'* *or* *'Request to Vice President to Offer Appointment - Over 5% of Minimum Range.'*

  The Hiring Authority may approve the 'Within 5%' form, and then proceed to the verbal offer. HRAPS and VP approval are required for the 'Over 5%' form.

  The Hiring Authority should identify the Department Contact on Form 5, if one has been assigned.

  This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.

- **Verify verbal offer and hire details**

  Verify that the candidate has received a verbal offer of employment from the Hiring Authority and that the hire details have been submitted to HRAPS (david.hickcox@humboldt.edu and nicole.log@humboldt.edu). In order to draft the Appointment Letter, HRAPS must be advised of the following details:

  - Effective start date
  - Supervisor/Lead Worker
  - Salary

- Appropriate Administrator
- Moving reimbursement allowance, if applicable
- Employee's current mailing address
- Employee's preferred e-mail address

This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.

- **Appointment Letter follow-up**

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The hiring department creates a *Form 104 - Appointment Document* for all non-recruited for and ongoing temporary appointments (e.g. emergency hire, casual worker, retired annuitant, etc.). HRAPS creates the Appointment Document for recruited-for positions.

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

User Account, Access & Services

- **Confirm HSU ID # & User Name**

Confirm that an HSU ID # and User Name have been created for the new employee. This information is required in order to establish user account settings and services.

The HSU ID # is created or reactivated in PeopleSoft as part of the POI process. The User Name is created or reactivated in Account Center within 24 hours of POI creation. The Help Desk (826-HELP) can provide this information on request.

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Verify e-mail account access**

Confirm that the new employee can log into his/her HSU e-mail account. The HSU e-mail address should be used as the primary e-mail for communication between the employee and the department for work-related communications.

For help resetting an account password or creating an e-mail alias, advise the employee to contact the Help Desk (826-HELP).

This checklist item may be a shared responsibility between the following roles: Employee and Department Contact.

• **TNS Service Request**	Submit a TNS Service Request through your department's Key Advisor to establish telephone, voicemail and network services. The TNS Key Advisor should also send the new employee's Name, Extension, Email, Dept. Location and Title to operations-tns@humboldt.edu to be added to the online campus directory. These requests should be submitted as soon as possible, to ensure that TNS services will be available on the employee's first day of work. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Confidentiality Statement**	Ensure that the employee's Confidentiality Statement has been signed and routed. Completion of this form is required for the employee to access certain services and systems. After the employee, Appropriate Administrator, and VP signatures have been collected, the completed form is sent to the Help Desk (826-HELP) to be logged, then routed to HRAPS for filing. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Access Request Form (ARF)**	Submit an Access Request Form to request employee access to Enterprise Systems (OBI, PeopleSoft, etc.), if applicable. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Establish access to non-ARF systems & services**	The Appropriate Administrator and/or Lead should determine whether the new employee requires access to any non-ARF systems, services, or files. The Department Contact may assist with securing appropriate access. Access may include both confidential and non-confidential areas, such as: • SharePoint sites • Department network folders • Drupal • Mailing Lists • Google Groups • Calendars (Google or Outlook) • Systat notifications • Personnel and Student Records For information on the CSU's Confidential Access Control policy, see ICSUAM 8060.00 http://www.calstate.edu/icsuam/documents/Section8000.pdf. This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

Notify all stakeholders and services providers that a new employee has been hired, and initiate processes for successful onboarding across campus.

- **Notify stakeholders & service providers**

  Stakeholders and service providers will vary depending on the hiring department, but may include:

  - Information Technology Services
  - Marketing & Communications
  - Learning Technology Specialists
  - Emergency Management
  - Facilities Management
  - Campus Mailroom

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Notify HRAPS of required training**

  Call the Learning Technologist at 826-5716 to discuss and plan for specific department training needs.

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Hard key & Access Card requests**

  Submit hard key and access card requests to the Locksmith. Hard key requests must be submitted on a Key Authorization Request form, which can be obtained from Facilities Management (826-3646). Campus keys and access cards are authorized through the proper department/administrative head with additional approval of the appropriate building coordinator. Access cards must be requested via e-mail, by sending the following information to cardsnow@humboldt.edu:

  - Last Name, First Name
  - HSU ID #
  - Access Card Template
  - Expiration Date (maximum 3 years from date of creation)
  - Additional (non-template) room numbers for the Personal Locking Plan specifying whether the key holder will have ownership, the ability to leave a door unlocked and/or to lock it by double dipping

  Detailed policy and procedure guidelines for physical access requests can be found on the http://facilitymgmt.humboldt.edu/lockshop-keys .

  To request a Housing key:

  Hard key and access card requests are made by the employee's Appropriate Administrator/Lead or by using the Issue request form. The request needs to specifically state which doors or type of template or hard key is needed.

  - Housing keys are picked up at the Housing Cashier's office, 2nd floor of the JGC
  - Key cards must be renewed three times per year: August, December, and May
  - A clear live scan must be on file prior to keys being issued

Department Preparation

- **Moving reimbursement**

  If the hiring department has approved reimbursement for relocation expenses, collect all relevant receipts and complete the necessary reimbursement paperwork. The department should work with the new employee to complete the reimbursement process according to HSU's Moving Reimbursement Policy.

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Acquire workstation equipment & office supplies**

  Work with ITS Desktop Support to set up a workstation and/or order new IT equipment. Please refer to the Standard Desktop Support Service Level Agreement to ensure that appropriate software/hardware guidelines are followed. Equipment and supplies may include:

  - Computer
  - Printer
  - Software
  - Mobile devices
  - Headset
  - HSU Name Tag
  - Business Cards
  - General Office Supplies

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Prepare work space**

  Work with Facilities Management to prepare the new employee's physical workspace. Space preparation may include:

  - Furnishings
  - Ergonomic assessment
  - Wall painting
  - Name plate
  - Mounted white boards/bulletin board
  - Floor cleaning or buffing

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Asset management**

  Work with the Financial Services Accounting Office to ensure that capitalized property is tagged and accounted for. Policy and procedures for asset management are detailed in the University Property Procedures Manual.

  For questions about asset management, contact Cynthia Perez (cynthia.perez@humboldt.edu).

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Inform staff and campus of new employee**

  Notify department staff and key campus personnel of your new employee's name, title as posted on vacancy announcement, and start date. You may wish to update records or prepare announcements for:

  - Internal contact lists
  - Organization charts
  - Department webpages
  - myHumboldt Portal
  - University Notices

  This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

Welcome and Orientation

• **Request first-day parking permit**	E-mail parking@humboldt.edu at least five business days before the employee's start date to arrange for a complimentary, one-day parking permit. Please include the name of the new employee and the date for which the permit is being requested. The employee will be able to pick up the permit at the parking kiosk.
• **Communicate with Buddy**	Communicate with the new employee's Buddy, if one has been assigned, and provide the Buddy with the new employee's name and campus contact information. The Buddy should convey his or her expected level of engagement with the new employee and should indicate any willingness to facilitate any onboarding tasks, perhaps in conjunction with a campus tour (e.g., walking down to Facilities to pick up keys/keycard; walking through Student Business Services and stopping off at cashier for parking permit; giving a tour of the library and visiting the ID card office). This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, Department Contact, and Buddy.
• **HSU Resource Guide**	Introduce the new employee to HSU's Resource Guide on the "*Welcome to Humboldt*" website (work in progress; planned for future release). This checklist item may be a shared responsibility between the following roles: Department Contact, Buddy, and Employee.
• **Tour of department and/or campus**	Introduce the new employee to the department and other key areas on campus. • Introduce new desk/work area • Personnel introductions • Phone and voicemail how-to • Common areas (kitchens, lounges, conference rooms, restrooms, etc.) • Emergency Exits and Resources This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Review administrative information**	Review general administrative information, policies & procedures. • Verify completion of sign-up documents • Department structure • Keys and Access Card usage • Mail (incoming and outgoing) • Absence and Leave Reporting • Confidentiality and Access • Purchase Requests This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.
• **Department-specific training**	The employee's training schedule should be determined by the Appropriate Administrator and/or Lead, and may include department-specific training in addition to required campus training.

The Department Contact may assist with ensuring that the new employee understands how to gain access to training, either by special arrangement or through HSU's Training and Professional Development website. Important training may include:

- PeopleSoft
- OBI
- Emergency Preparedness
- Moodle
- California's Child Abuse and Neglect Reporting Act (CANRA)
- Defensive Driving
- Workspace Safety
- Harassment Prevention
- Avoiding Unconscious Bias
- Title IX

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Alarm codes and panic button**

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

Documentation

- **Request documentation**

Request any additional documentation required by the hiring department such as licenses, certifications, CPR training, etc.

- **Background Check/Live Scan**

All new employees, those returning after an absence of more than 1 year, and current employees under voluntary consideration for a sensitive position are required to undergo a Background Check.

- Background Checks are ordered by the Department from **Accurate Background**. The new hire will receive an email from Accurate Background, and follow the embedded link to complete the required fields. For more information, see the Background Check Packages document, or visit the Accurate Background Check Training Site.
- **LiveScan Service Request Form** – **Please Note:** LiveScan fingerprinting is only required for positions with regular/unsupervised direct contact with minors. For all other employees, the Background Check would be ordered through the Department's Accurate Background Account.
- If LiveScan is completed on HSU campus, use the form linked above, with an HSU Chartfield String, available from your department.
- If LiveScan is completed at a non-HSU California Live Scan agency, use the form linked above, and save receipts for the cost. Your department will reimburse the expense based on submitted receipts.

This checklist item may be a shared responsibility between the following roles: Department Contact and Employee.

HUMBOLDT STATE UNIVERSITY

Employee Checklist

Welcome to Humboldt State University!

We are so pleased you will be joining the HSU community. Please review the items listed below as you prepare for your first day in your new position.

Employee Information

Name:	_____	Supervisor/Lead:	_____
Position:	_____	Administrator:	_____
Start Date:	_____	Dept. Contact:	_____

Preparing for Your New Position

- **Appointment Letter**

  Sign your Appointment Letter, and return it to Human Resources & Academic Personnel Services (HRAPS) with:

  - Please enter the required information requested via the Candidate Information Form (http://bit.ly/1sr6ASF) you will need to enter your Social Security number, date of birth, and the job title for your position.
  - You will also need to sign the letter acknowledging the acceptance of the position and return the letter by scanning and emailing (hsuhr@humboldt.edu) or faxing a copy to HRAPS at 707.826.3625; and return the original letter to HRAPS.
  - Your signed Confidentiality Statement
  - Your off-campus email address

  You may also fax your signed letter back or call Human Resources 707.826.3625 with the necessary information. However, you are still required to return the physical letter with a wet signature.

- **Verify e-mail account access**

  Please verify that you are able to log into your HSU e-mail account. Once it has been created, your HSU e-mail address should be used as the primary e-mail for work-related communications between you and your department/campus.

  For help resetting an account password or creating an e-mail alias, contact the Help Desk (826-HELP).

  This checklist item may be a shared responsibility between the following roles: Employee, and Department Contact.

On Your First Day

- **Sign-up documents**

Before the end of your first day of work, make sure that you have received and understand your "sign-up" documents. These documents will vary depending on the appointment and are generally completed in the Human Resources & Academic Personnel Services (HRAPS) office in Siemens Hall 212:

- Employee Action Request
- Employee Information Request
- I-9 with documentation
- Social Security Card
- Confidentiality Form- add HSU ID #
- ID Card Request
- Direct Deposit
- Parking Permit Info Slip
- Pay Warrant/Green & Gold Calendar
- Union Information - CSUEU Packet; Unit 11 - sign-up sheet
- Campus Policies Packet
- Benefits/Sign-up Packet & HIPAA
- Flex Cash & Dental/Vision Form
- CalPERS 801 Form
- Form 1083
- Bring Information about your immediate family (spouse and child(ren)) such as legal names, social security numbers, and birthdates. This information may be needed for benefit forms/employee sign-ups.

This checklist item may be a shared responsibility between the following roles: Employee and HRAPS.

- **Background Check/Live Scan**

All new employees, those returning after an absence of more than 1 year, and current employees under voluntary consideration for a sensitive position are required to undergo a Background Check.

- Background Checks are ordered by the Department from **Accurate Background**. The new hire will receive an email from Accurate Background, and follow the embedded link to complete the required fields. For more information, see the Background Check Packages document, or visit the Accurate Background Check Training Site.
- **LiveScan Service Request Form** – **Please Note:** LiveScan fingerprinting is only required for positions with regular/unsupervised direct contact with minors. For all other employees, the Background Check would be ordered through the Department's Accurate Background Account.
- If LiveScan is completed on HSU campus, use the form linked above, with an HSU Chartfield String, available from your department.
- If LiveScan is completed at a non-HSU California Live Scan agency, use the form linked above, and save receipts for the cost. Your department will reimburse the expense based on submitted receipts.

This checklist item may be a shared responsibility between the following roles: Department Contact and Employee.

- **HSU ID card**

  Have your photo taken and pick up your HSU employee ID card in the Library at the Circulation Desk. Bring your HSU ID Request form with you. (This Request form is provided by HRAPS with your sign-up documents.)

  More information about HSU Campus ID cards, including hours of service, can be found on the Campus ID Office website.

- **Pick up keys and/or Access Card**

  If your new position requires you to use hard keys or Access Cards, your department will request these for you. You may call Facilities Management (826-3646) to check on the status of requested keys or cards.

  Keys and Access Cards can be picked up from the Facilities front office during regular business hours. You must bring a photo ID with you when you pick up your key(s)/card(s).

Welcome and Orientation

- **HSU Resource Guide**

  Review HSU's Resource Guide on the "*Welcome to Humboldt*" website (work in progress; planned for future release).

  This checklist item may be a shared responsibility between the following roles: Department Contact, Buddy, and Employee.

- **New Employee Orientation**

  You will receive an invitation from HRAPS to participate in an Employee Orientation.

  This checklist item may be a shared responsibility between the following roles: HRAPS and Employee.

Payroll Checklist

The Payroll Department that enters employee data into PeopleSoft and the State Controller's Office, creating job and pay records.

Preparing for Appointment

• **Copy of Appointment Letter**	Payroll receives a copy of the Appointment Letter from the VP's office.
• **Create Job Record**	Payroll creates a job record in PeopleSoft when the Appointment Document and all necessary sign-up documents are received.

Welcome and Orientation

• **New Employee Orientation**	Payroll shares pertinent information during Employee Orientation.

Buddy Checklist

When a new employee is recruited, the Appropriate Administrator may choose to assign a Buddy to partner with the new employee during their first few weeks on the job. The Buddy's role is to help familiarize the new employee with campus norms and culture.

The Buddy-Employee relationship is casual and informal, and should be tailored to accommodate the level of engagement desired by both parties. It is intended to pair a knowledgeable and motivated employee with an eager new hire to facilitate integration into the HSU community. While primarily responsible for offering advice and guidance regarding the day-to-day aspects of working at HSU, the Buddy may also offer their perspective on myriad campus practices, policies, and culture. At a minimum, the Buddy should be accessible to the new employee (via email or telephone) and be responsive when asked for assistance or guidance.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

New Employee Information

Name:	_____	Position:	_____
Start Date:	_____	Email:	_____
Phone:	_____	Supervisor/Lead:	_____
Administrator:	_____	Dept. Contact	_____

First Day/Week of New Employee Start Date

• **Communicate with hiring department**	Communicate with the Department Contact and convey your expected level of engagement with the new employee. • Receive new employee's contact information • Indicate your willingness to facilitate any onboarding tasks, perhaps in conjunction with a campus tour (e.g., walking down to Facilities to pick up keys/keycard; walking through Student Business Services and stopping off at cashier for parking permit; giving a tour of the library and visiting the ID card office). This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, Department Contact, and Buddy.
• **Contact employee**	Establish contact & arrange to meet employee at the end of first day/week to answer any questions.
• **HSU Resource Guide**	Introduce the new employee to HSU's Resource Guide on the "*Welcome to Humboldt*" website (work in progress; planned for future release).

This checklist item may be a shared responsibility between the following roles: Department Contact and Buddy.

- **Campus Tour** Show the new employee around campus, hitting all the areas you feel are important, and explain *why* they are important. As noted above, check with the Department Contact to see if there are any onboarding tasks you can (and are willing to) help complete while on a brief tour. Suggested topics of conversation during the tour include:
    - Where to park
    - Where to eat
    - Where to walk (trails)
    - Sports events
    - Employee fitness classes
    - Tune in at Noon series
    - Center Arts
    - Center Activities
    - The Quad
    - Bookstore
    - Student Recreation Center
    - Library
    - Discuss HSU news and event topics
    - The myHumboldt Portal
    - University Notices
    - The Lumberjack
    - Events Calendar
    - Green & Gold Calendar
    - Discuss how to access common computer systems
    - The myHumboldt Portal
    - Gmail
    - PeopleSoft
    - SkillPort (required training)