

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.
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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

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

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- **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.

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- **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.

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- **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.

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- **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
- 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.

- **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)
- 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: 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.