

Washington State University Extension Supervisor Checklist for New Employees

PRIOR TO START DATE

- Ensure that offer letter and personalized welcome is sent (templates available from HRS):
 - Include URL link or information on benefits paperwork
 - Include Campus map or County maps
 - Provide directions to work site
 - Provide Department contact names, email addresses and phone numbers
 - Letter should be cc'd to HRS Personnel file, Benefits, Etc.
- Confirm acceptance of offer, start date and work hours.
- Provide Campus Parking and transportation information as appropriate
- Provide location, time and date of new Employee Orientation: _____
- Provide location, time and date of Benefits Orientation: _____
- Prepare for department's one-on-one, unit-specific orientation with new hire
- Prepare employee's workspace, office equipment, supplies, etc
- Complete payroll paperwork at <http://www.wsu.edu/payroll/taxes/taxes.htm>
- Complete the W-4 at <http://www.irs.gov/pub/irs-pdf/fw4.pdf> and the I-9 at <http://lookoutservices.net/laborcheck/asp/archive/pdfs/i-9.pdf> forms (submitted prior to obtaining Network ID)
- Create Network ID access, AIS access, WSU NetID Information, WSU AD (active directory)

FIRST DAY

- Supervisor or appointed person greets new employee and introduces him/her to co-workers

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- Discuss office standards and procedures
- Tour of department/building, including restrooms, break room, etc
- Provide an area to watch the New Employee Safety Video located at <http://experience.wsu.edu/scholarvids/MMRFiles/MMR/HumanResource/031407safety.a> [sx](#) (approx 18 minutes long) and complete the Safety Checklist located at http://www.wsu.edu/manuals_forms/PDF/SPPM/S20-30-2.pdf
 - Safety features (fire extinguisher, emergency exits, first aid kit, stairs, etc.)
- Review payroll dates at <http://www.wsu.edu/payroll/payday/paydays.htm> and direct deposit at <http://www.wsu.edu/payroll/fspay/directdep/directdep.htm>
- Review work hour policies (flex time, Comp time, Overtime, Office hours, Lunch and break hours, time documentation, etc)
- If bargaining unit covered employee, provide a copy of the contract
- Complete paperwork for key issuance
- Secure a Cougar Card if applicable. Information is located at <http://cougarcard.wsu.edu/default.aspx>
- Secure a Parking Permit if applicable
 - WSU Pullman at <http://www.parking.wsu.edu/> , WSU Spokane at <http://www.spokane.wsu.edu/campusresources/Facilities/Parking/index.asp> , and WSU Vancouver at <http://www.vancouver.wsu.edu/adm/fo/psafety/parking.htm>
- Review Computer log-in, usage, computer use policies and laws, etc.
- Network ID – Computer Accounts; email address
- Review phone usage, phone card and processes for long-distance calls, on-line phone directories
- Have employee set up their outgoing voicemail message.

FIRST WEEK

- Provide an overview of all pertinent procedures

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- WSU Extension Organizational chart at <http://ext.wsu.edu/about/documents/orgchart.pdf>
- Reporting relationships at <http://ext.wsu.edu/admin/docs/AdminTeam.pdf>
- Review WSU Extension Overview at <http://ext.wsu.edu/overview.html>
- Provide link to the Business Policies and Procedures Manual (BPPM) at http://www.wsu.edu/~forms/HTML/BPPM/01.01_Table_of_Contents.htm , the Executive Policy Manual (EP) at http://www.wsu.edu/~forms/HTML/EPM/EP00_Introduction_and_Table_of_Contents.htm , and the Safety Policies and Procedures Manual (SPPM) at http://www.wsu.edu/manuals_forms/HTML/SPPM/S00_Intro_and_Indexes/S02.01_Table_of_Contents.htm ; inform employee they are responsible to adhere to all the policies/procedures of WSU
 - [Discrimination and Sexual Harassment policy](#) – [Executive Policy #15](#)
 - Provide an area to take the on-line Sexual Harassment training located at <http://training.newmedialearning.com/psh/washingtonstateu/>
 - Review the How to file a Sexual Harassment claim at <http://www.chr.wsu.edu/default.asp?PageID=1152>
 - Review the Workplace Violence policy: BPPM 50.30.1: http://www.wsu.edu/~forms/HTML/BPPM/50_Safety_and_Security/50.30_Workplace_Violence.htm
 - Review the Drug and Alcohol policy : Executive Policy #20: http://www.wsu.edu/~forms/HTML/EPM/EP20_Alcohol_and_Drug_Policy.htm
 - Review the use of University Resources
 - Universal Property: BPPM 20.35: http://www.wsu.edu/~forms/HTML/BPPM/20_Property/20.35_Use_of_University_Property.htm
 - Personal use of University Property: BPPM 20.37: http://www.wsu.edu/~forms/HTML/BPPM/20_Property/20.37_Personal_Use_of_University_Resources.htm
 - Review the Electronic Use policy (computer resources): Executive Policy #4: http://www.wsu.edu/~forms/HTML/EPM/EP4_Electronic_Publishing_Policy.htm

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- Provide an area to take the State Ethics Law on-line training located at <http://ethics.wa.gov/>
- Review the Accident Prevention Responsibility/ SPPM 20.10: http://www.wsu.edu/manuals_forms/HTML/SPPM/S20_Accident_Prevention/S20.10_Accident_Prevention_Responsibility.htm
- Review the Employee Assistance Program (EAP) Web site: <http://www.eap.wsu.edu/> – corresponding BPPM 60.86 is http://www.wsu.edu/~forms/HTML/BPPM/60_Personnel/60.86_Employee_Assistance_Program.htm :
- Ombudsman Office: 509-335-1195; <http://www.wsu.edu/~ombuds/>
- Center for Human Rights Web site: <http://www.chr.wsu.edu/>
- Continue general orientation to work unit
- Discuss interoffice communications procedures (internal routing/information systems, incoming and outgoing mail, memo routing, informing staff of schedule, etc)
- Review support staff responsibilities and procedures for getting work completed (preparing documents, filing, etc)
- Review departmental expectations/standards (e.g., appropriate dress)
- Discuss office procedures regarding equipment, supplies and materials
 - Office and audio visual equipment, manuals and operation
 - Location of stored materials/supplies
 - Main office telephone system and fax procedures, usage and etiquette (how to answer phone and take messages)
- Check on the employee's supplies and work environment
- Provide a copy of the Position Description
 - Review Performance Expectations (*required for civil service and bargaining unit covered employees*)
- Review the employee's project assignments

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- Review leave reporting and processing procedures
- Discuss annual leave and sick time accrual
- Discuss the process for requesting time off
- Discuss holiday scheduling and personal holiday
- Provide applicable employee information depending on the employee classification (all can be accessed at <http://www.hrs.wsu.edu>)
 - Faculty Manual located at http://facsen.wsu.edu/faculty_manual/index.html
 - Administrative Professional Handbook located at <http://www.hrs.wsu.edu/utills/file.aspx?fileid=6>
 - Washington Administrative Code for Civil Service employees at <http://apps.leg.wa.gov/wac/default.aspx?cite=357>
 - Describe probationary or trial service (applicable to civil service and bargaining unit covered staff)
 - Contract information for Bargaining Unit covered employees
- Discuss performance review process
- Discuss educational/training opportunities including release time and tuition fee waiver/reimbursement

FIRST MONTH

- Ensure that Benefit forms are completed and submitted to HRS within the first month of employment. Forms are located at <http://www.hrs.wsu.edu/Benefits>
- Review WSU Extension Policies and Procedures located at <http://ext.wsu.edu/admin/>
- Schedule any required training for entry level supervisors, chairs and directors, payroll procedures, Business Objects, AIS, Travel, Purchasing, Personnel, Van Driver, etc

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- Schedule for New Employee and Benefits Orientation located at <http://www.hrs.wsu.edu/New%20Employee%20Orientation>
- If significant performance concerns contact district director or associate dean and director.
- Discuss specific job description
 - List major duties and/or responsibilities
 - List areas of joint responsibility with other staff members
 - Identify required reporting
 - Identify lines of accountability and evaluation
 - Discuss how the employee will be evaluated on the duties and responsibilities identified
- Project assignment and progress meetings – meet with employee periodically to review progress, assess training needs, offer coaching and receive feedback and questions. This may be in person or via technology.
- Review orientation materials, note questions, explore HRS, and arrange to call/meet with appropriate people to get the answers
- Review program area's previous year's reports
- Have employee read co-worker's WORQS reports and identify areas where collaboration with their program area maybe productive
- Discuss "Professional Development Plan" – set goals and plan for needed in-service training and professional development during the employee's first and second years. Contact Jim Lindstrom for assistance as needed. He can be reached at jlindstr@wsu.edu or 509-358-7871.
- Review Professional Development Materials:
 - Statewide in-service opportunities
 - Information regarding graduate school, Scholarship opportunities and fee waivers (as appropriate)

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- Discuss HRS On-line Training located at <http://www.hrs.wsu.edu/HRS%20Training%20Home%20Page> and other Professional Development opportunities
- Block dates on calendar for major county, regional, and state events in which new employee will be involved
- Review available office software programs
- Review program area's existing mailing list
- Assist employee with visiting key leaders, volunteers, other professionals to learn more about the community and program
- Review program area's advisory committees rosters
- Arrange to participate in shadowing of peers and R & E centers, Departments and specialist as appropriate
- Plan and schedule a meeting with mentor as appropriate

FIRST QUARTER

- Project assignment and progress meetings – meet with employee periodically to review progress, assess training needs, offer coaching and receive feedback and questions. This may be in person or via technology.
- Within first 3 months of probationary or trail service appointment review expectations and provide feedback as appropriate.
- Assess/discuss performance needs
- Review Behavior Matrix, Strategic Framework, Core Competencies as applicable. Core Competencies are located at <http://ext.wsu.edu/pd/corecomp/index.htm>
- Schedule development/skill enhancement training
- If there are significant performance concerns contact district director or associate dean and director.

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FIRST SIX MONTHS

- Project and progress meetings – meet with employee periodically to review progress, assess training needs, offer coaching and receive feedback and questions. This may be in person or via technology.
- Conduct Performance Evaluation for Probationary or Trial service employees prior to conclusion of probationary or trail service period (designated 6-month period)
- If significant performance concerns contact district director or associate dean and director.

FIRST YEAR

- Complete employee's Annual Review (not applicable to bargaining unit covered employees)
- Review position description and performance expectations and revise if necessary
- Meet and discuss Annual Performance Evaluation; provide copy of current position description and performance expectations
- Discuss Professional Development and training opportunities

Employee Name: _____

Date of Hire: _____

Title: _____

Probationary or Trial Service End Date
(applicable to civil service employees): _____

cc: Supervisor
Department File