

Checklist for 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.)

Employee Name _____ EID Number _____

Employment Date _____ Mailing Address _____

Phone Number _____

Email Address _____

Supervisor/Departmental responsibilities

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
- Begin the orientation process by directing your employee to the New Employee Orientation web sites:
 - General Orientation - <http://www.washington.edu/admin/hr/pod/newemp/>
 - Benefits Orientation - <http://www.washington.edu/admin/hr/roles/newee/benorient/index.html>
- Affirmative Action Data Form -- Confidential Information. New employee should complete the online form:
 - <https://prp.admin.washington.edu/AffirmativeAction/UWNETID/AAform.asp> (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>

General Work Information - Review/Discuss the following items

- Job description, job duties, performance expectations and performance review.
- Terms of appointment (employment program, probationary or trial period if any, salary.
- Vacation and sick leave accrual.
- Vacation and sick leave request and use procedures.
- Labor contract coverage if applicable

Email Access for Employees

- If new employees are already on OPUS, they can go to the Computing and Communications 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

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 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

Access to communications – see <http://www.washington.edu/admin/comtech/> for items listed below

- UWATS account
- voice mail
- pagers
- cell phones
- Other - List

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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, email nebula-support@cac.washington.edu
<p>Access to Payroll and OPUS review functions</p> <ul style="list-style-type: none"> • Send an email to opushelp@u.washington.edu to add the employee as a reviewer for your Payroll Unit Code (PUC) or to request that the employee receive PERMs. This email should include the individual's name, UWNetID, and PUC • To set up access to OPUS, the PTR online system, and to add individuals to the pronline mailing list, email pronline@u.washington.edu • If an employee is transferring from another department within UW and will have payroll responsibilities in your department, contact opushelp@u.washington.edu to provide them with access to your PUC. • To add individuals to the Payroll mailing list and the Payroll Coordinator list, email payroll@u.washington.edu
<p>Keynes Access and SecurID card</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> ◦ http://www.washington.edu/admin/adminsystems/forms ◦ Questions? Email info@cac.washington.edu, call (206) 543-5970, ext 4, or visit http://www.washington.edu/admin/adminsystems/INTRO
<p>ProCurement Card or Reconciler Account Access</p> <ul style="list-style-type: none"> • The ProCurement card application is available at: <ul style="list-style-type: none"> ◦ https://www.washington.edu/admin/finserv/procard/pdfs/procardapp.pdf • If the employee is transferring from another department, the defaults can be changed so the employee can use the ProCurement Card in their new department. Submit the new budget and object coding defaults and the new reconciler's UWNetID name for the cardholder to the ProCurement Card administrator at djwright@u.washington.edu • For additional questions, call the ProCurement Card hotline at (206) 543-5252
<p>Travel VISA card</p> <ul style="list-style-type: none"> • Faculty, staff, and students must be in "active" status on the UW payroll and expect to take at least one business trip per year to be eligible for a Travel VISA card • The Travel VISA card application is available at: <ul style="list-style-type: none"> ◦ http://www.washington.edu/admin/travel/forms/travelcardapplication.pdf • For more information, call (206) 543-5867 or (206) 543-0658
<p>Corporate Travel Account (CTA) approval authorization</p> <ul style="list-style-type: none"> • See http://www.washington.edu/admin/finserv/travel/visa.html • For more information, call (206) 543-5867 or (206) 543-0658
<p>Access to Petty Cash funds</p> <ul style="list-style-type: none"> • 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
<p>Records retrieval authorization (UW Records Management Office)</p> <ul style="list-style-type: none"> • Send an email to urc@u.washington.edu
<p>Access to OASIS (Equipment Inventory System)</p> <ul style="list-style-type: none"> • Email eio@u.washington.edu and include the employee's name, UWNetID, and org codes • For additional questions, see http://www-oasis.cac.washington.edu/admin/adminsystems/oasis
<p>Access to UW Development Advance</p> <ul style="list-style-type: none"> • Complete the Advance Login/Confidentiality form located in the Information Management section at: <ul style="list-style-type: none"> ◦ https://devar.washington.edu/forms/forms.asp • 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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Note: If you find that any of this information is outdated, please contact uwhr@u.washington.edu.