

Checklist 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.)

For Newly Hired Employees

Review the following list with your supervisor or departmental administrator. Some of the information will be needed to sign up for UW benefits

Action Items

- Find out your Employee Identification Number (EID):_____
- Find out your Employment Program:_____ see: <http://www.washington.edu/admin/hr/roles/ee/index.html>
- Complete the Affirmative Action Data form at: <http://www.washington.edu/provost/ap/eoaa/aadf.html>
(Form provides essential information Benefits Office needs to complete employee retirement plan enrollment)
- Find out if your department has signed you up for early e-mail
- Sign up for New Employee Orientation and Benefits Orientation– go to:
Seattle Campus: <http://www.washington.edu/admin/hr/roles/newee/orient/areas/seattle/staff.html>
Bothell Campus: <http://www.washington.edu/admin/hr/roles/newee/orient/areas/bothell/staff.html>
Tacoma Campus: <http://www.washington.edu/admin/hr/roles/newee/orient/areas/tacoma/staff.html>
Be sure to enroll in benefits programs within 31 days of start date.
- For Seattle Campus employees: Register for Sexual Harassment Prevention class at: <http://www.washington.edu/admin/hr/roles/newee/orient/sexharassprevent-trng.html>

Review Items – For discussion with your supervisor and/or departmental manager or administrator

- Terms and conditions of employment (employment program/probationary period/salary)
- Job duties and performance expectations
- Performance appraisals
- Work schedules, breaks, and overtime
- Time and leave reporting
- Labor contract / dues obligation (if applicable) or Professional Staff Program for professional staff.
- Paydays and how to arrange direct deposit
- Types of leave and leave accrual rates
- Requesting time off
- Function of department/organizational chart
- Interrelationships with other departments
- Building use and access/security
- Departmental Safety Plan
- Equipment use and access
- Telephone use/etiquette/voicemail/directory
- E-mail account and usage tips
- Emergency contact information
- Inclement weather procedures/policies

Checklist for Newly Hired Classified and Professional Staff

For Administrators and Employing Officials

Employee Name _____ EID Number _____
Employment Date _____ Mailing Address _____
Phone Number _____ Employment Program _____
Email Address _____

(Employees and managers at UW Medical and Harborview Medical Center – please contact your Human Resource department for new employee requirements.)

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
- New Employee Orientation - Direct the new employee to the New Employee UW Human Resource Page at: <http://www.washington.edu/admin/hr/roles/newee/index.html>
 - Instruct the employee to register for the New Employee and Benefits orientations.
 - Ensure signup for required Prevention of Sexual Harassment Training.
- Affirmative Action Data Form -- Confidential Information. New employee should complete the online form:
 - <http://www.washington.edu/provost/ap/eoaa/aadf.html> (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 requirements.
- • Terms of appointment: Employment program, probationary or trial period if any, salary.
- • Work schedule: Hours of work, breaks, meal periods, absence reporting.
- • Vacation and sick leave accrual.
- • Vacation and sick leave request and use procedures including how to request leave use.
- • Labor contract coverage if applicable

Email Access for Employees

- If new employees are already on OPUS, they can go to the UW Information Technology 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 security and 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. Review equipment use policies and appropriate use of University equipment.

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<p>Access to communications – see http://www.washington.edu/itconnect/phones/ for items listed below</p> <ul style="list-style-type: none">• Long distance services• voice mail• pagers• cell phones• Other - List
<p>Add to departmental and centrally managed email lists</p>
<p>Discuss location of computer files and policies for computer use</p>
<p>Set up access to network directories and electronic calendar. For the Nebula network, complete this form: https://www.washington.edu/itconnect/wares/nebula/forms/index.cgi</p>
<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 procard@u.washington.edu• For additional questions, call the ProCurement Card hotline at (206) 543-5252
<p>UW Travel Card</p> <ul style="list-style-type: none">• UW Travel Card information is available at:<ul style="list-style-type: none">○ http://f2.washington.edu/fm/ps/corporate-travel-services/individual-travel-cards
<p>Corporate Travel Account (CTA) approval authorization</p> <ul style="list-style-type: none">• See http://www.washington.edu/admin/procsrvcs/ecommerce/cta/visa.cta.html• For more information, call (206) 543-7171
<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

Checklist for Newly Hired Classified and Professional Staff

Access to UW Development Advance

- Complete the Advance Login/Confidentiality form located in the Information Management section at:
 - <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

If you are hiring an individual who will be located out of state, see also the checklist for out of state workers at: www.washington.edu/admin/hr/forms/employment/chklsts/ee-outofstate.doc

Note: If you find that any of this information is outdated, please contact uwhr@u.washington.edu.