

ONBOARDING CHECKLIST

FOR ON-SITE AND HYBRID EMPLOYEES

INSTRUCTIONS

This checklist was created as a **GUIDELINE** for you and your leader to customize for your specific needs

- ✓ Click on any hyper-links ([example](#)) to access the linked resource
 - ✓ Ask your leader if they have already customized a copy of this checklist for you
 - If not, work together to add, remove, or alter bullet points to best fit the needs for you and your specific role (Tip: Download the [Word Document version](#) for easy customization if needed)
- Ask questions if you are unsure about anything along the way

Will you be working remotely? Consider using the [Remote Employee Checklist](#) instead.

BEFORE YOUR FIRST DAY

TO-DO's

- ☐ Confirm the start date and time with your leader
- ☐ Confirm how you should dress and where to park on the first day
- ☐ Process for Payroll remotely through [Shared Services](#)
- ☐ Talk with your leader about equipment needs that may be needed for you to do your job (e.g., do you need access to a headset? a webcam? etc.)
- ☐ Other:

YOUR FIRST DAY

TECHNOLOGY TO-DO's

- ☐ Visit login.wvu.edu to claim account and enroll in [two-factor authentication](#)
- ☐ Install [VPN](#) (Virtual Private Network) for access certain WVU systems and shared files (*applicable for hybrid employees*)
- ☐ [Request](#) your Mountaineer ID card, which is used for access to WVU services, buildings and events
- ☐ Visit the [WVU Portal](#) to familiarize yourself with systems such as [Mountaineer Marketplace](#) and the Leave System
 - ☐ **TIP:** Ask your leader which platforms listed on the Portal are most applicable to your role
- ☐ Visit the [ITS service page](#), including the [service catalog](#) and [knowledge base](#)
- ☐ Ask about with platforms the team commonly uses, such as Microsoft Teams, Outlook, SharePoint, Zoom, OneDrive, etc.
- ☐ Other:

SCHEDULE, JOB DUTIES AND RELATED TASKS

- ☐ Complete the Virtual New Mountaineer Orientation module
- ☐ Review information on [New Employee Benefits](#) and contact [WVU Shared Services](#), Workforce Administration, by emailing SharedServices@mail.wvu.edu or by calling 304-293-6006 if you have questions about enrolling in or processing for your benefits.
- ☐ Discuss your work schedule, meal and rest breaks and hours of operation
- ☐ Ask your leader about their management style
- ☐ Is there a mentor on staff who will be serving as your “onboarding buddy”?
- ☐ Other:

POLICIES AND PROCEDURES TO COVER

- ☐ Review pay and leave policies with your leader
- ☐ Other:

TOURING YOUR WORK ENVIRONMENT

- ☐ Meet your co-workers
- ☐ Take a tour of the workspace and ask to see things like, “where to find common office supplies?” and important locations, such as kitchens, restrooms, time clocks, water stations, etc.
- ☐ Review security and safety procedures for your building (e.g., where to meet in case of a building evacuation, location of emergency exits, etc.)
- ☐ Secure building keys and access codes
- ☐ Set up your office phone password and voicemail message (if applicable)
- ☐ Other:

FIRST WEEKS TO DAY 30

WAYS TO SOCIALIZE

- ☐ Visit websites to introduce you to the culture, such as:
 - ☐ **E-News**: Provides a daily update on important WVU news and events
 - ☐ **Appreciation Toolkit**: Appreciation is one of our core WVU Values
 - ☐ **WVU Traditions**: the history of great traditions embodies Mountaineer pride
 - ☐ **Branding**: refer to the branding toolkit for tools such as color codes, font, and downloads
 - ☐ **Campus Conversations**: We are transparent and empower employees
- ☐ Ask your leader about meeting with team members and other helpful contacts at the university
- ☐ Review the **WVU Employee Code of Conduct** and **WVU Values**
- ☐ Explore your department's web-page and/or other relevant publications
- ☐ Make note of out any **acronyms** you come across (be sure to ask what each term means)
- ☐ Other

TECHNOLOGY, ACCESS AND RELATED

- ☐ Confirm with your leader that you have a fully functioning computer with access to all necessary systems (and notify them if there are still any systems or platforms you need access to)
- ☐ Do you require a **PCard** or business cards? Ask if these are applicable to you
- ☐ If interested in purchasing a parking permit, visit the **Transportation and Parking** website for more information
- ☐ Other:

SCHEDULE, JOB DUTIES AND RELATED

- ☐ Discuss your job position and duties
- ☐ Ask about any initial tasks you can get started on
- ☐ Confirm any required and recommended training
 - ☐ Title IX?
 - ☐ Safety Training?
 - ☐ Other:
 - ☐ **TIP**: Create a profile in the **LOD Class Registration Portal** and ask about classes that interest you
- ☐ Review the **WVU Academic Calendar** and **Holiday Schedule**
- ☐ Other:

POLICIES AND PROCEDURES

- ☐ Familiarize yourself with the **Classified Employee Handbook** (for Classified staff) or the **Faculty Handbook** for Faculty and/or Faculty Equivalent Academic Professional positions
- ☐ Review how to request annual leave and how to properly report off if you cannot report to work for sick reasons
- ☐ Review the policy on cell phone use/personal calls
- ☐ Other:

PERFORMANCE MANAGEMENT

- ☐ Discuss the importance of good job performance and its effect on receiving merit increases (when applicable)
- ☐ Ask for feedback and voice questions
- ☐ Review the process of the probationary period and schedule the probationary review on both of your calendars
- ☐ Discuss with your leader how your first week went (any surprises, challenges, etc.) and ask how to prepare for the next week
- ☐ Other:

YOUR FIRST 60 DAYS (TWO MONTHS)

- ☐ Schedule meet-and-greets with important stakeholders, partners and customers
- ☐ Solicit feedback from your supervisor about your progress to-date
- ☐ Other:

YOUR FIRST 90 DAYS (THREE MONTHS)

- ☐ Meet with your supervisor to discuss how your employment is going (progress, any surprises, challenges, areas for improvement, questions, etc.)
- ☐ Ensure that you have completed any required compliance training
- ☐ Other:

YOUR FIRST 180 DAYS (SIX MONTHS)

- ☐ Your supervisor should schedule and conduct your six-month probationary performance review by or before the completion of your first six months
- ☐ Discuss completed compliance training and future training needs
- ☐ Other:

YOUR FIRST YEAR

- ☐ Congratulations on your one-year anniversary with West Virginia University!
- ☐ Continue to work with your supervisor on individual and team objectives and key results
- ☐ Other: