**INSTRUCTIONS**

The following checklists are a template that youshould **customize for your new employee’s specific role.** Customize by adding, removing, or altering bullet points to best fit your team’s needs**.** Pay particular attention to those who work nontraditional hours in nontraditional locations.

Cover the items that are essential and important (don’t overwhelm them), and think about what makes sense to include in their first day, weeks, etc. Emphasize that we all have different types of employ­ees (those who work midnight shift, outside all day, in offices, teaching in classrooms, etc.) and that everyone is important.

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**P****RE-ARRIVAL (BEFORE YOUR NEW EMPLOYEE’S FIRST DAY)**

Improving your employee’s initial experience jumpstarts their ability to contribute to your unit’s goals and increases employee engagement. This starts *before* your new employee’s arrival. A welcoming work environment with informed co-workers and a fully equipped workspace helps new employees feel welcome and taken care of on their first day.

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**ENGAGE EARLY TO WELCOME THE NEW EMPLOYEE**

* Call or email (after the start date is confirmed)to share how **e**xcited you are for their arrival
* Confirm start date, time, place, where to park, dress code, etc.
* Consider including a “[team newsletter](https://westvirginiauniversity-my.sharepoint.com/%3Aw%3A/g/personal/cmcoder_mail_wvu_edu/EZqFXkhub85LkPsGZB6rvCoBFy5bA9A4U0oqULn46Syjjw?e=KjhVMg)” to showcase your team and current projects/initiatives
* Make yourself available to answer questions and share the best way to get in contact with you
* Other:

**TECHNOLOGY ACCESS AND RELATED**

* Determine/order/set up technology and other equipment:
	+ Telephone
	+ Computer/laptop
	+ Mobile devices (tablet/cell phone)
* Contact ITS (304-293-4444) or your local IT support team to have systems set up in advance (network drives, printer access, etc.)
* Order necessary keys
* Receive login credentials from Shared Services (this assignment details message is sent after processing for payroll)
* Other:

**SOCIALIZATION**

* Announce the new employee’s arrival using the [Welcome to Our Team Template](https://westvirginiauniversity-my.sharepoint.com/%3Aw%3A/g/personal/cmcoder_mail_wvu_edu/EQpPlWG23C1LuFj8Ysq4kTYBLrV5D0T0K7Wwk2IHMNjZWQ?e=cP91AM)
* Copy the new employee on relevant upcoming events or messages applicable to the new employee’s position
* Consider pairing the new employee with a mentor (*Tip!* Keep a list of employees who are interest in having a mentee)
* Have the team autograph a welcome card or sign
* Plan for someone to meet them at New Employee Orientation to take them to lunch and get them to their worksite/office for their first day debriefing with you
* Other:

**SCHEDULE**

* Create the first week schedule (first-day assignment, key meetings, etc.), share a drafted agenda with your new employee before their start date, and have a printed copy for their arrival
* Put a reminder on your calendar for the new employee’s first day, and their one-year work-aversary
* Other:

**WORK ENVIRONMENT**

* Prepare employee’s work area, making sure it is clean and set up with necessary supplies (e.g., scissors, tape, pens, post-its, stapler, trash/recycle cans, etc.)
* Assemble welcome packet from the department (include job description, contact names and phone lists, campus map, parking and transportation infor­mation, information on your unit/school, departmen­tal passwords/codes for copiers and other reference sources used)
* Print a [nameplate](https://westvirginiauniversity-my.sharepoint.com/%3Ap%3A/g/personal/cmcoder_mail_wvu_edu/ERKjhnPu9ElEgpQIsl7i-eoBKQ_1nYUjCVPNTuFQPs7K8Q?e=j3ciPu) if applicable
* Identify and label mailbox
* Other:

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# **FIRST DAY**

The first day on the job is an important time to make sure a new employee feels welcomed and prepared to start working and begins to understand the WVU culture and values and position and performance expectations.

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**SOCIALIZATION**

* Be available to greet the employee on the first day
* Introduce the employee to others in the workplace
* Take the employee to lunch
* Have them complete the optional “[Tell Us About Yourself](https://talentandculture.wvu.edu/files/d/0d94ee23-cfbe-4d7a-ac07-6216b4a980fe/tell_us_about_yourself_form.pdf)” form
* Set up recurring 1-1 meetings for you and the new employee
* Other:

**TECHNOLOGY ACCESS AND RELATED**

* Ensure employee visits [login.wvu.edu](https://login.wvu.edu/self-service) to claim account and enrolls [in Duo two-factor authentication](https://wvu.teamdynamix.com/TDClient/KB/ArticleDet?ID=44017)
* Give employee keys (if applicable), and ensure building access has been granted for their ID cards
* Demonstrate how to use the Portal (entering leave, etc.)
* Explain how to use the [phone](file:///C%3A%5CUsers%5Ccmcoder%5CDownloads%5Cwvu.teamdynamix.com%5CTDClient%5CKB%5CArticleDet%3FID%3D6407)
* Introduce employees to ITS service page, including the [service catalog](https://wvu.teamdynamix.com/TDClient/Requests/ServiceCatalog) and [knowledge base](https://wvu.teamdynamix.com/TDClient/KB/ArticleDet?ID=6407)
* Discuss what the [Shared Service Center](https://sharedservices.wvu.edu/) is and what they do
* Other:

**SCHEDULE, JOB DUTIES AND RELATED**

* Clarify the first week’s schedule
* Review the hours of work
* Discuss your management style and expectations
* Explain the work of your unit, the employee’s role and working relationships
* Provide an overview of the functional area – its pur­pose, organizational structure and goals
* Review the organizational chart and explain levels of supervision in the unit
* Describe how employee’s job fits in the department and contributes to the unit/college/division and to WVU
* Other:

**POLICIES AND PROCEDURES**

* Explain expectations for customer care (such as how to answer the phone)
* Discuss dress code/uniform requirements if applicable
* Ensure the employee has finished processing for Payroll, required Benefits, and has been issued an ID badge
* Other:

**WORK ENVIRONMENT**

* Give a tour of work site/office including location of mailbox, copiers, emergency exits, water stations, kitchens/break rooms and bathrooms
* Show hourly employees where time clocks are located
* Discuss how and when to clock in and out (meal breaks, etc.)
* Discuss transportation and parking and encourage the employee to contact the WVU Parking Office to discuss parking options and costs
* Provide department or building-specific safety and emergency information (what to do in the event of a fire or other building emergency, etc.)
* Show an interest! Ask what might be meaningful or helpful to them (daycare options, upcoming athletic events, etc.)
* Explain how the employee can get additional office supplies
* Other:

**FIRST WEEKS TO DAY 30**

Share internal processes and performance ex­pectations while helping your employee settle into the work environment.

Check in on a regular basis. Show that you care about their progress and begin setting short- and long-term goals.

**SOCIALIZATION**

* Direct new employees to:
	+ [E-News](https://enews.wvu.edu/): Provides a daily update on im­portant WVU news and events
	+ [Go Beyond](https://talentandculture.wvu.edu/manage-and-lead/recognition-resources): Our internal recognition portal; walk them through how to use it, and why it’s important
	+ [Branding](https://brand.wvu.edu/): If they will be using the WVU brand, refer them to the branding toolkit
	+ [Staff Tuition Assistance Program](https://staffcouncil.wvu.edu/programs): We invest in employees
	+ [Front Line Professionals](https://frontline.wvu.edu/): Provides a venue for WVU employees to connect, share and learn
	+ [Campus Conversations](https://bureaucracybusters.wvu.edu/campus-conversations): We are transparent and empower employees
* Review/set up meetings with team members or helpful contacts at the university
* Add to applicable listservs, email groups, Microsoft Teams or other departmental messaging tools
* Other

**TECHNOLOGY, ACCESS AND RELATED**

* Ensure employee has fully functioning computer with systems and printer access
* Introduce Office 365 (office365.wvu.edu), and make sure employee has it installed on their computer
* Demonstrate how to install optional software from Software Center (Self Service on Mac) or have local IT staff do this
* Does your employee require a [PCard](https://procurement.wvu.edu/employees/pcard/pcardapplicants) or business cards? Order if applicable
* Other:

**SCHEDULE, JOB DUTIES AND RELATED**

* Review job description and outline duties and expectations (provide employee with a copy)
* Discuss individual goals and objectives — remember to be specific and realistic
* Give employee their initial assignments (make it achievable)
* Confirm any required and recommended training
	+ Title IX?
	+ Children on Campus?
	+ Safety?
	+ Other:
* Share the [WVU Employee Handbooks](https://talentandculture.wvu.edu/employee-relations/handbooks)
* Discuss [Values and Code of Conduct](https://talentandculture.wvu.edu/employee-code-of-conduct)
* Discuss the bi-annual Culture Survey and how we strive to improve the working environment
* Emphasize our Mountain­eer traditions and explain what a land-grant institution is
* Debrief with employee after initial meetings, trainings on initial assignment(s); also, touch base quickly each day
* Provide additional information of department’s purpose, value added to WVU, goals and initiatives
* Other:

**POLICIES AND PROCEDURES**

* Explain policies and procedures for overtime (for hourly employees), annual and sick leave accruals, use of annual and sick leave time, holidays, etc.
* Explain how to request annual/sick leave and how to properly report off from work (e.g., is it okay to text or do you need to call?)
* Provide copies of relevant policies for your unit (e.g., absenteeism, inclement weather, [IT policies and procedures](https://it.wvu.edu/policies-and-procedures))
* Explain consequences of taking time not earned off (taken off payroll, discipline, etc.)
* Explain Compensatory Time Off (CTO)
* Explain expectations for customer care (such as how to answer the phone)
* Review the policy on cell phone use/personal calls
* Other:

**PERFORMANCE MANAGEMENT**

* Begin the practice of providing ongoing performance feedback
* Encourage them to ask for feedback and voice questions
* Explain the annual performance review and goal-set­ting process (be honest and realistic with expectations you set)
* “Tell a story” with specific examples of expecta­tions — remember that you can’t expect the desired behavior unless you are setting clear expectations
* Give specific examples of how their everyday work impacts our students
* Discuss the importance of performance and its im­pact on receiving merit increase
* Talk about performance elements and descriptors — describe which are most important to their job and provide a link to or copy of these documents, specifically the performance review form
* Review the process related to the probationary period
* Schedule the new employee’s probationary review on both of your calendars
* Set 30-day priorities
* Utilize open-ended questions to allow for ongoing conversation (see 30- Day Check-in Questions)
* Other: