

**SUPERVISOR ORIENTATION CHECKLIST**

<b>New Employee:</b>		<b>Start Date:</b>	
<b>Position:</b>		<b>Department:</b>	
<b>Supervisor:</b>			

**INSTRUCTIONS:** This checklist is provided to assist supervisors in orienting new employees. After a particular topic has been covered, the completion date should be entered in the column to the right of it. When the entire checklist is completed, the form should be sent to Human Resources to be placed in the employee's personnel file.

<b>Pre-Arrival</b>	<b>Resource Office</b>	<b>Completion Date and Initials</b>
<input type="checkbox"/> Check that the <b>work area</b> is equipped and ready for new employee (equipment, desk, chair, name plate, business cards, and department mailbox).	Supervisor	
<input type="checkbox"/> Verify that the office <a href="#">phone</a> has been activated and new voicemail installed.	Learning and Information Technology (LIT) 109, Sorensen Hall Ext. 5000	
<input type="checkbox"/> New employees will be provided two cloth <b>face masks</b> . Departments must request the face masks by completing the <a href="#">COVID PPE Requisition Form</a> . Supervisors should note on the form that the request is for a new employee.	Procurement and Materials Management, 140 University Services Building, Ext. 2453	
<input type="checkbox"/> Ensure new employees are aware and have reviewed the Return to Fall Guidelines prior to arriving on campus. The Return to Fall Guidelines can be found on the <a href="#">Return to Work website</a> .	Supervisor	
<input type="checkbox"/> Order <a href="#">keys</a> from Physical Plant, Key Control Center by filling out the Key Requisition Form. All key requisitions <b>MUST</b> be approved by the individual's supervisor and by the Building Supervisor before it can be processed by the Key Control Center.	Key Control Center, 103 General Services, Ext. 2200	
<input type="checkbox"/> <a href="#">Activate Email</a> : HR will request an email account after hiring information has been received. HR will send the hiring supervisor or designee the username and 7-digit campus ID number of the new employee. The new employee will create a password for their account by visiting the <a href="#">Stout Password</a> site and choosing "activate new account". To activate the account the new employee will need their campus ID number and date of birth.  See the list of knowledgebase articles that address the most common questions for new faculty and staff <a href="https://kb.uwstout.edu/page.php?id=53675">https://kb.uwstout.edu/page.php?id=53675</a> .	HelpDesk, 109 Sorensen Hall, Ext. 5000	
<input type="checkbox"/> <b>Prepare</b> employee's computer. <b>Request access</b> and appropriate <b>security</b> for systems employee may need (PeopleSoft, ImageNow, etc).	HelpDesk, 109 Sorensen Hall, Ext. 5000 <b>or</b> designated system responsible person	
<input type="checkbox"/> Coordinate with <a href="#">IT Consultant</a> to meet with the new staff member early on the first day to help set up technology.	Supervisor	
<input type="checkbox"/> Answer <b>last minute questions</b> the employee may have by contacting them prior to their start date (i.e. arrange a date for lunch on the employees first day, identify dress code, indicate where and when to arrive on first day, etc.)	Supervisor	

First Day	Resource Office	Completion Date and Initials
<input type="checkbox"/> <b>Introduce</b> new employee to department staff and explain their roles.	Supervisor	
<input type="checkbox"/> <b>Tour</b> of work area – Identify mail systems, phone usage, location of supplies, restrooms, break areas, etc.	Supervisor	
<input type="checkbox"/> Ensure employee completes the required return to work <a href="#">Safer@Stout online training</a> . This training is required for all employees.	Supervisor	
<input type="checkbox"/> Ensure employee has viewed the three <a href="#">online orientation modules</a> (Getting Started, Payroll, and Benefits).	Supervisor	
<input type="checkbox"/> Ensure <a href="#">Human Resources paperwork</a> is complete and submitted to Human Resources.	Supervisor	
<input type="checkbox"/> Explain use and location of <b>office equipment</b> (fax, copier, shredder, printers, etc.).	Supervisor	
<input type="checkbox"/> Explain <b>work procedures</b> – hours of work, breaks, meal periods, call-in procedures, leave notification procedures, etc.	Supervisor	
<input type="checkbox"/> Take a <b>breather</b> . Go out for a cup of coffee, soda or lunch with the employee.	Supervisor	
Accompany employee to get: <input type="checkbox"/> <a href="#">Stout ID Card</a> (BlueCard) – Contact the Campus Card Office to verify if the employee is in the I.D. system. Once they are in the system, employees will need to bring a valid state or government issued ID and go to the Campus Card Office where their photo will be taken, and paper work processed.	Campus Card Office, 110 Price Commons, Ext. 3686	
<input type="checkbox"/> <a href="#">Parking Permit</a> - Employees can stop into the Parking Services Office to obtain a permit or purchase online. Permits may be purchased at any time during the year. Cost is prorated; you only pay the fee for the remainder of the contract year. The usual parking contract year is mid-August to mid-August (only year-term permits are offered) and a yearly reminder is sent to all staff to renew their permit.	Parking Services, University Services Building, 110, Ext. 1792	
<input type="checkbox"/> Request <b>building card access</b> by completing the <a href="#">Card Access Request Form</a> . Completed forms need to be sent to the <a href="#">building supervisor</a> for approval. <b>NOTE:</b> People needing access must have the ID portion of their Stout BlueCard activated.	Card Access Administrator, Price Commons, Room 110, Ext. 3686	

First Week	Resource Office	Completion Date and Initials
<input type="checkbox"/> Schedule a studio appointment to have an official <b>portrait</b> taken, contact the university photographer at: <a href="mailto:Stoutphotos@uwstout.edu">Stoutphotos@uwstout.edu</a> . If the new employee would like their photo and directory information included in a profile for the external website, please contact: <a href="mailto:webmaster@uwstout.edu">webmaster@uwstout.edu</a> .	University Marketing and Communications, 15 Administration Bldg., Ext. 5116	
<input type="checkbox"/> Provide employee with a <b>tour</b> of campus.	Supervisor	
<input type="checkbox"/> Identify <b>job expectations</b> and <b>responsibilities</b> . Go over position description, evaluation process and acceptable performance. Performance evaluations can be accessed on the <a href="#">Performance Evaluation</a> site.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Complete the three <b>mandatory compliance trainings</b> : Harassment and Discrimination, Information Security, and Mandatory Reporter. New employees will receive an email from <a href="mailto:serviceoperations@uwss.wisconsin.edu">serviceoperations@uwss.wisconsin.edu</a> and they will need to complete the training 30 calendar days from the receipt of the email.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Ensure position description and <b>Personal Protection Equipment (PPE) Hazard Assessment Certifications</b> are reviewed and signed and sent to Human Resources (This applies only to certain positions). In addition, explain appropriate workplace safety standards/procedures as identified on	Human Resources, 203 Administration Bldg., Ext. 2149	

the Personal Protection Equipment (PPE) Hazard Assessment form. Provide effective basic safety training that meets that responsibility. Document your training.	Health and Safety Unit, 130 University Services Building, Ext. 2258	
<input type="checkbox"/> Go over <b>timesheets</b> and/or <b>leave time</b> reporting. Questions can be directed to Human Resources.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Go over the process for accessing <b>earning and leave statements, tax information and benefit information</b> . Employees will need to access <a href="https://my.wisconsin.edu">https://my.wisconsin.edu</a> ; select UW-Stout and enter their UW-Stout username and password.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Complete <b>Emergency Contact Information</b> by going to <a href="https://my.wisconsin.edu">https://my.wisconsin.edu</a> and then Personal Information.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Go over <b>organizational chart</b> of the department. Identify mission and goals of the department and how the department fits within the organization.	Supervisor	
<input type="checkbox"/> Identify <b>building hours</b> and after hour access procedures.	Supervisor	
<input type="checkbox"/> Add employee to office <b>e-mail</b> listserv and give access to office <b>calendar</b> .	Supervisor	
<input type="checkbox"/> Request employee to receive access to the office <b>network drive</b> for shared office documents.	Ask 5000, 109 Sorensen Hall, Ext. 5000	
<input type="checkbox"/> Order <a href="#">business cards</a> (if applicable).	Printing Services, 139 University Services Bldg. Ext. 5257	
<input type="checkbox"/> Ensure employee provides university email address into <a href="#">StoutAlert</a> . StoutAlert is the university's emergency alert and notification system. Employees should sign up for alert formats (i.e. text messages).	University Police, 110 University Services Building, Ext. 2222	
Arrange for Authorizations (if applicable): <input type="checkbox"/> <a href="#">Driver Authorization Form</a> - The online form must be completed and turned in before an employee is authorized to drive a university vehicle or receive mileage reimbursement on a personal vehicle.	Safety and Risk Management, 130 University Services Building, Ext. 1793	
<input type="checkbox"/> <a href="#">US Bank Card</a> ( <i>for employees who travel</i> ). The US Bank on-line application (paper submission not accepted) must be completed by the employee, followed by the on-line approval by the supervisor and routed to the card program administrator for employment verification, approval and submission to US Bank.	Business Services, 125 Administration Bldg. Ext. 2155	
<input type="checkbox"/> <a href="#">Procurement Card</a> Complete a Purchasing Card Application which must be approved by management at the level required by the university to grant purchasing approval for transactions \$1,500 and under.	Procurement and Materials Management, 140 University Services Building, Ext. 2453	

First Month	Resource Office	Completion Date and Initials
<input type="checkbox"/> Introduce new employee to <b>staff external</b> to the unit with whom he/she will work.	Supervisor	
<input type="checkbox"/> Ensure that new employee has a copy or knows where to find the appropriate employee <b>handbook</b> . <ul style="list-style-type: none"> <li>• <a href="#">Faculty, Academic Staff/Limited Appointee Handbook</a></li> <li>• <a href="#">University Staff</a></li> </ul>	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Your new employee may order a <a href="#">UW-Stout Name Badge</a> . The name badge will be sent to your new employee via campus mail once it is received. Please check with your supervisor to determine if there are any departmental requirements/specifications regarding your name badge.	Chancellor's Office, 325 Administration Building, Ext. 2441	
Discuss/View <a href="#">important policies</a> : <input type="checkbox"/> Disability Accommodations Policy and Procedure <input type="checkbox"/> Sexual Harassment Policy	Human Resources, 203 Administration Bldg., Ext. 2149	

<input type="checkbox"/> EEO/AA Policy <input type="checkbox"/> <a href="#">Mandatory Reporting of Child Abuse</a>		
<input type="checkbox"/> Discuss <a href="#">Employee Assistance Program (EAP)</a> - The UW-Stout contracts with “Kepro” to provide assistance to employees needing mental healthcare, financial consulting, legal advice and other resources that promote a healthy work/life balance. Employees and members of their household can call 24 hours a day, every day of the year.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Review <a href="#">travel</a> procedures (if applicable).	Business Services, 125 Administration Bldg. Ext. 2155	
<input type="checkbox"/> Identify <a href="#">training and development</a> opportunities. To view a list of professional development opportunities and program see the <a href="#">training and development</a> site. A calendar of upcoming opportunities is available on the site.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Have your new employee register and complete the search committee training “ <a href="#">Acquiring Talent Workshop</a> ” in the upcoming year.	Human Resources, 203 Administration Bldg., Ext. 2149	
<input type="checkbox"/> Follow up with new employee on any employment <b>questions</b> or concerns he/she may have (on-going).	Supervisor	

**For Supervisor Use**

**Resource List for new employee (checklists, written instruction manuals, etc.):**

**Websites that will be utilized (bookmark):**

**People to Connect With (Campus Resources):**

Name	Office	Role

**Orientation Plan Acknowledgement**

<b>Employee’s Signature/Date:</b>		
<b>Supervisor’s Signature/Date:</b>		
<b>Human Resources Signature/Date:</b>		

*Please sign, date, and send to Human Resources, 203 Administration Bldg. **Please note:** If a department checklist already exists, please attach it to this form with signatures. Both forms will be placed in the employees personnel file. For questions, please contact Cally Henderson, x-2289 or [hendersonc@uwstout.edu](mailto:hendersonc@uwstout.edu)*