# Department Contact Checklist

When a new employee is recruited, the Hiring Authority may identify a Department Contact to serve as the point of contact for the new employee and to provide support to the new employee's Appropriate Administrator and/or Lead. The Department Contact also assists with new employee documentation and monitors the onboarding process on behalf of the department.

The Hiring Authority should communicate with the Department Contact's supervisor, and with the Appropriate Administrator and/or Lead, to establish expectations for this role.

Please complete following items as thoroughly as possible to ensure a smooth and welcoming transition for the new employee.

## Employee Information

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| Name: | ____________________ | Position: | ____________________ |
| Start Date: | ____________________ | Supervisor/Lead: | ____________________ |
| HSU ID #: | ____________________ | Administrator: | ____________________ |
| User Name: | ____________________ | Buddy (optional): | ____________________ |

## Preparing for Appointment

- **Verify Form 5 completion**

  The department should order the Accurate Background Check when submitting the Form 5.

  *Form 5* must be approved prior to the job offer. There are two versions of the form that may be used*: 'Offer of Appointment - Within 5% of Minimum Range'* *or* *'Request to Vice President to Offer Appointment - Over 5% of Minimum Range.'*

  The Hiring Authority may approve the 'Within 5%' form, and then proceed to the verbal offer. HRAPS and VP approval are required for the 'Over 5%' form.

  The Hiring Authority should identify the Department Contact on Form 5, if one has been assigned.

  This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.

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- **Verify verbal offer and hire details**

  Verify that the candidate has received a verbal offer of employment from the Hiring Authority and that the hire details have been submitted to HRAPS (david.hickcox@humboldt.edu and nicole.log@humboldt.edu ). In order to draft the Appointment Letter, HRAPS must be advised of the following details:

  - Effective start date
  - Supervisor/Lead Worker
  - Salary

- Appropriate Administrator
- Moving reimbursement allowance, if applicable
- Employee's current mailing address
- Employee's preferred e-mail address

This checklist item may be a shared responsibility between the following roles: Hiring Authority, Appropriate Administrator and/or Lead, and Department Contact.

- **Appointment Letter follow-up**

HRAPS notifies the Hiring Authority or proxy and/or the Department Contact when Appointment Letter is signed and returned to HRAPS. The Department Contact may also check in with HRAPS to find out if the Appointment Letter has been received.

If the Appointment Letter has not been returned within the expected timeframe, the Department Contact should consult with the Hiring Authority to determine who will reach out to the new employee for follow-up, and in what format.

This checklist item may be a shared responsibility between the following roles: HRAPS, Hiring Authority and Department Contact.

- **Appointment Document**

The hiring department creates a *Form 104 - Appointment Document* for all non-recruited for and ongoing temporary appointments (e.g. emergency hire, casual worker, retired annuitant, etc.). HRAPS creates the Appointment Document for recruited-for positions.

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

## User Account, Access & Services

- **Confirm HSU ID # & User Name**

Confirm that an HSU ID # and User Name have been created for the new employee. This information is required in order to establish user account settings and services.

The HSU ID # is created or reactivated in PeopleSoft as part of the POI process. The User Name is created or reactivated in Account Center within 24 hours of POI creation. The Help Desk (826-HELP) can provide this information on request.

This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact.

- **Verify e-mail account access**

Confirm that the new employee can log into his/her HSU e-mail account. The HSU e-mail address should be used as the primary e-mail for communication between the employee and the department for work-related communications.

For help resetting an account password or creating an e-mail alias, advise the employee to contact the Help Desk (826-HELP).

This checklist item may be a shared responsibility between the following roles: Employee and Department Contact.

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| • **TNS Service Request** | Submit a TNS Service Request through your department's Key Advisor to establish telephone, voicemail and network services. The TNS Key Advisor should also send the new employee's Name, Extension, Email, Dept. Location and Title to operations-tns@humboldt.edu to be added to the online campus directory.<br>These requests should be submitted as soon as possible, to ensure that TNS services will be available on the employee's first day of work.<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Confidentiality Statement** | Ensure that the employee's Confidentiality Statement has been signed and routed. Completion of this form is required for the employee to access certain services and systems.<br>After the employee, Appropriate Administrator, and VP signatures have been collected, the completed form is sent to the Help Desk (826-HELP) to be logged, then routed to HRAPS for filing.<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Access Request Form (ARF)** | Submit an Access Request Form to request employee access to Enterprise Systems (OBI, PeopleSoft, etc.), if applicable.<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Establish access to non-ARF systems & services** | The Appropriate Administrator and/or Lead should determine whether the new employee requires access to any non-ARF systems, services, or files. The Department Contact may assist with securing appropriate access. Access may include both confidential and non-confidential areas, such as:<br>• SharePoint sites<br>• Department network folders<br>• Drupal<br>• Mailing Lists<br>• Google Groups<br>• Calendars (Google or Outlook)<br>• Systat notifications<br>• Personnel and Student Records<br>For information on the CSU's Confidential Access Control policy, see ICSUAM 8060.00 http://www.calstate.edu/icsuam/documents/Section8000.pdf.<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |

Notify all stakeholders and services providers that a new employee has been hired, and initiate processes for successful onboarding across campus.

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| • **Notify stakeholders & service providers** | Stakeholders and service providers will vary depending on the hiring department, but may include:<br>• Information Technology Services<br>• Marketing & Communications<br>• Learning Technology Specialists<br>• Emergency Management<br>• Facilities Management<br>• Campus Mailroom<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Notify HRAPS of required training** | Call the Learning Technologist at 826-5716 to discuss and plan for specific department training needs.<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Hard key & Access Card requests** | Submit hard key and access card requests to the Locksmith. Hard key requests must be submitted on a Key Authorization Request form, which can be obtained from Facilities Management (826-3646). Campus keys and access cards are authorized through the proper department/administrative head with additional approval of the appropriate building coordinator. Access cards must be requested via e-mail, by sending the following information to cardsnow@humboldt.edu:<br>• Last Name, First Name<br>• HSU ID #<br>• Access Card Template<br>• Expiration Date (maximum 3 years from date of creation)<br>• Additional (non-template) room numbers for the Personal Locking Plan specifying whether the key holder will have ownership, the ability to leave a door unlocked and/or to lock it by double dipping<br>Detailed policy and procedure guidelines for physical access requests can be found on the http://facilitymgmt.humboldt.edu/lockshop-keys .<br>**To request a Housing key:**<br>Hard key and access card requests are made by the employee's Appropriate Administrator/Lead or by using the Issue request form. The request needs to specifically state which doors or type of template or hard key is needed.<br>• Housing keys are picked up at the Housing Cashier's office, 2nd floor of the JGC<br>• Key cards must be renewed three times per year: August, December, and May<br>• A clear live scan must be on file prior to keys being issued |

## Department Preparation

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| • **Moving reimbursement** | If the hiring department has approved reimbursement for relocation expenses, collect all relevant receipts and complete the necessary reimbursement paperwork. The department should work with the new employee to complete the reimbursement process according to HSU's [Moving Reimbursement Policy](). <br><br> This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Acquire workstation equipment & office supplies** | Work with ITS Desktop Support to set up a workstation and/or order new IT equipment. Please refer to the Standard Desktop Support Service Level Agreement to ensure that appropriate software/hardware guidelines are followed. Equipment and supplies may include: <br><br> • Computer <br> • Printer <br> • Software <br> • Mobile devices <br> • Headset <br> • HSU Name Tag <br> • Business Cards <br> • General Office Supplies <br><br> This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Prepare work space** | Work with Facilities Management to prepare the new employee's physical workspace. Space preparation may include: <br><br> • Furnishings <br> • Ergonomic assessment <br> • Wall painting <br> • Name plate <br> • Mounted white boards/bulletin board <br> • Floor cleaning or buffing <br><br> This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Asset management** | Work with the Financial Services Accounting Office to ensure that capitalized property is tagged and accounted for. Policy and procedures for asset management are detailed in the University Property Procedures Manual. <br><br> For questions about asset management, contact Cynthia Perez (cynthia.perez@humboldt.edu). <br><br> This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Inform staff and campus of new employee** | Notify department staff and key campus personnel of your new employee's name, title as posted on vacancy announcement, and start date. You may wish to update records or prepare announcements for: <br><br> • Internal contact lists <br> • Organization charts <br> • Department webpages <br> • myHumboldt Portal <br> • University Notices <br><br> This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |

## Welcome and Orientation

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| • **Request first-day parking permit** | E-mail parking@humboldt.edu at least five business days before the employee's start date to arrange for a complimentary, one-day parking permit. Please include the name of the new employee and the date for which the permit is being requested. The employee will be able to pick up the permit at the parking kiosk. |
| • **Communicate with Buddy** | Communicate with the new employee's Buddy, if one has been assigned, and provide the Buddy with the new employee's name and campus contact information.<br><br>The Buddy should convey his or her expected level of engagement with the new employee and should indicate any willingness to facilitate any onboarding tasks, perhaps in conjunction with a campus tour (e.g., walking down to Facilities to pick up keys/keycard; walking through Student Business Services and stopping off at cashier for parking permit; giving a tour of the library and visiting the ID card office).<br><br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, Department Contact, and Buddy. |
| • **HSU Resource Guide** | Introduce the new employee to HSU's Resource Guide on the *"Welcome to Humboldt"* website (work in progress; planned for future release).<br><br>This checklist item may be a shared responsibility between the following roles: Department Contact, Buddy, and Employee. |
| • **Tour of department and/or campus** | Introduce the new employee to the department and other key areas on campus.<br><br>• Introduce new desk/work area<br>• Personnel introductions<br>• Phone and voicemail how-to<br>• Common areas (kitchens, lounges, conference rooms, restrooms, etc.)<br>• Emergency Exits and Resources<br><br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Review administrative information** | Review general administrative information, policies & procedures.<br><br>• Verify completion of sign-up documents<br>• Department structure<br>• Keys and Access Card usage<br>• Mail (incoming and outgoing)<br>• Absence and Leave Reporting<br>• Confidentiality and Access<br>• Purchase Requests<br><br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Department-specific training** | The employee's training schedule should be determined by the Appropriate Administrator and/or Lead, and may include department-specific training in addition to required campus training. |

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| | The Department Contact may assist with ensuring that the new employee understands how to gain access to training, either by special arrangement or through HSU's Training and Professional Development website. Important training may include:<br>• PeopleSoft<br>• OBI<br>• Emergency Preparedness<br>• Moodle<br>• California's Child Abuse and Neglect Reporting Act (CANRA)<br>• Defensive Driving<br>• Workspace Safety<br>• Harassment Prevention<br>• Avoiding Unconscious Bias<br>• Title IX<br>This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |
| • **Alarm codes and panic button** | This checklist item may be a shared responsibility between the following roles: Appropriate Administrator and/or Lead, and Department Contact. |

## Documentation

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| • **Request documentation** | Request any additional documentation required by the hiring department such as licenses, certifications, CPR training, etc. |
| • **Background Check/Live Scan** | All new employees, those returning after an absence of more than 1 year, and current employees under voluntary consideration for a sensitive position are required to undergo a Background Check.<br>• Background Checks are ordered by the Department from **Accurate Background**. The new hire will receive an email from Accurate Background, and follow the embedded link to complete the required fields. For more information, see the Background Check Packages document, or visit the Accurate Background Check Training Site.<br>• **LiveScan Service Request Form** – **Please Note:** LiveScan fingerprinting is only required for positions with regular/unsupervised direct contact with minors. For all other employees, the Background Check would be ordered through the Department's Accurate Background Account.<br>• If LiveScan is completed on HSU campus, use the form linked above, with an HSU Chartfield String, available from your department.<br>• If LiveScan is completed at a non-HSU California Live Scan agency, use the form linked above, and save receipts for the cost. Your department will reimburse the expense based on submitted receipts.<br>This checklist item may be a shared responsibility between the following roles: Department Contact and Employee. |