New Employee Onboarding Guide for Student Affairs Departments

(This checklist does not apply to emergency hires)

New Employee Name:	Department:
EMPL ID:	Start Date:
Title:	Classification:
Hiring Manager:	Onboarding Host/Lead:
Personal Email:	Personal Phone:
Building/Office Location:	Work Phone:

Before Employee's Start Date

Department Responsibility

1. **Contact the New Employee** – Contact the employee, welcome them to the team, let them know who their onboarding host/lead will be, and set a place for them to attend the Zoom portion of the New Employee Orientation.
2. **New Hire Announcement** – Let the search committee, your department, and any related offices know about the new hire. Send an email asking staff to welcome the new employee and give them some information about them: name, job title, and any other information staff should know about the new person (e.g., where else the incumbent has worked on- or off-campus, if they are "Made at Sac State," etc.).
3. **Identify an Onboarding Host/Lead –** Assigned by hiring manager. Onboarding lead will help acquaint new employee with the office space, dynamic, and expectations.
4. **Identify work location** – Where will the New Employee be stationed?
5. **First Week Schedule** – Plan a schedule for the employee's first week. See *Attachment B – Sample Onboarding Schedule*
6. **Connect with SA-IT for Equipment and to Establish Service/Access**
   a. See *Attachment A – Collaboration with SA-IT* for details on the following:
      i. Equipment (identifying hardware needed and source of funding)
      ii. Access (software, shred drives, calendars, list-serves, phone, etc.)
      iii. Scheduling a "Get to Know Your Laptop" session

HR Responsibility

When the candidate accepts the offer, background clears, and a start date is set (before their first day)

- HR will email the new employee, their manager, and the Division analyst with the following documents
    - Offer Letter, Position Description, CANRA General Reporter Acknowledgement, CANRA Memo Health Advisory, New Employee Orientation Checklist (NEO checklist items are also included in this document), Sustainability Statement, and Union message (from their applicable union)
    - See *Attachment D* for a sample of the Orientation Notice/letter from HR

<u>First Day of Employment</u>

*Applies to employees new-to-campus only

HR Responsibility

1. **HR Orientation*** – In-person and Zoom components
    - New Employee Orientation typically takes place every other Monday via Zoom at 9:15 a.m.
    - At New Employee Orientation the employee will learn about the university, staff policies and procedures, benefits, union representation, and payroll.
2. **Parking Permit * -** Parking permit can be obtained in the UTAPS Office located at the Welcome Center. They will need the license plate number of their vehicle(s). Review available parking locations with the employee.
3. **OneCard * -** Sac State OneCard (University ID Card) can be obtained in the Bursar's Office in Lassen Hall 1003. They will need a photo ID and their offer letter.

Department Responsibility

1. **Keys -** Complete a Key Request form (link) for keys and fob(s) the new hire requires and get the appropriate signatures. The new employee will need their OneCard to pick up their key(s) from Facilities Services.
2. **Equipment –** Refer to *Attachment A – Collaboration with SA-IT*
3. **SacLink Setup* -** Have the new employee sign onto portal using Onboarding host's device (www.saclink.csus.edu). They will have to enter their employee ID number or the last 4 digits of their social security number, last name, and DOB. Once configured, email sa-it@csus.edu with employee's new SacLink username (can be completed ahead of first day by following New Employee Checklist sent by HR).
4. **Show Space/Equipment Location** - Space and equipment will have been set-up by SA-IT. Have employee get acquainted with space/equipment. Note: New Employee can use departmental generic account if SacLink ID has not been set-up.
    a. Tell them about future meetings with SA-IT where we'll ensure they're logged in to appropriate software, finalize applicable configurations, and answer any

questions they may have about the device. However, any task-specific questions need to be answered by DEPT.

5. **Campus Tour* –** tours@csus.edu

SA-IT Responsibility (Relies heavily on Departmental Collaboration)

1. **Identify New Employee's Saclink ID*** to begin Access Configuration.
2. **Grant New Employee Access (PARTIAL/LIMITED)** – Grant access based on Department responses.
3. **SA-IT meets with New Employee for "Get to Know Your Laptop" Session (Can happen within first 3 days)** – Department will ensure the New Employee is aware/invited/available for the pre-emptively scheduled time.

First Week of Employment

Division Responsibility (Division Analyst):

1. **Welcome Kit –** Contact Division Analyst for Student Affairs promotional items. Make the new employee feel welcome!
2. **Reporting Relationship** – If position provides lead work direction or supervision, then work with Division Analyst to move staff to report to the position in CMS.
3. **Professional Photo** - Contact Student Affairs Communications team for headshot, if desired

Department Responsibility

1. **Introductions/Org Chart Review -** Provide an organization chart so the employee can understand how their position fits into the department and the division. Provide an overview of each staff members' area(s) of responsibility.
2. **CSU Learn Trainings -** On the 3rd day the employee should be able to access CSU Learn and complete required trainings, as well as position specific trainings.
   a. Data Security and FERPA
   b. CSU's Sexual Misconduct Prevention Program
   c. Discrimination Harassment Prevention Training
3. **Business Cards –** if applicable [Business Cards order instructions](#)
4. **Name tag –** if applicable [University Print Ordering Information](#)
5. **CONCUR Training** – Concur access and the related travel card is required for employee travel. Contact Accounts Payable to set up a time for the new employee to attend a Concur Training and help the new employee complete the Travel Card application, if applicable.
6. **Directory Listing** –Update the campus directory (via employee's My Sac State - Personal/Campus Director/ENS) and any applicable websites as appropriate.

7. **Systems Access –** Enter the CARS request for system(s) access. Reach out to the Division Analyst if assistance is needed. Can only be completed after employee has completed CSU Learn Training.
8. **Safety & Emergency –** Review department's safety and emergency procedures, including emergency evacuation procedures. Review location of first aid kit, fire alarm(s), AED, and fire extinguisher(s). Explain the Emergency Notification System (ENS).
9. **Supervisor Discussion Topics**
   o Mission and goals of the university, division, and department
   o Position information such as job description, performance expectations, evaluation methods, probationary period/temporary status, lead work direction, security codes, assignments, and duties
   o Relevant university, division, and/or department policies
   o Office culture such as attire, personal conduct, code of ethics/behavior, confidentiality, phone etiquette, professional development, and team/staff meetings
   o Work procedures such as office hours, schedule, breaks/lunch, office supplies, email and internet usage, and steps to resolve problems and conflicts
   o Leave and timekeeping procedures such as notification of time off for planned (vacation) and unplanned absences and time reporting for hourly employees (if applicable)
   o Overtime procedures (if applicable) and who overtime must be approved by in advance of work being performed
   o Review use of phones, fax machines, copiers, and other work supplies

Note: If your department does not have Admin support, coordinate with your Division Analyst for assistance.

Attachments:
A: Collaboration with SA-IT
B: Sample Onboarding Schedule
C: Resources and Information
D: New Employee Orientation Information Example

New Employee Checklist for Student Affairs Departments

Attachment A – Collaboration with SA-IT

New Employee Name:	Department:
Onboarding Host/Lead:	Start Date:
Title:	Classification:

Before Employee's Start Date

Department Responsibility

1. **Contact SA-IT to Confirm Space and Equipment Needs** – Communicate work location and technology equipment needs.
2. **Identify New Employee Access (PARTIAL/LIMITED).** SA-IT access requests are limited to:
   a. **Departmental Shared Drive** – Which folders within your dept shared drive will they need access to? Provide SA-IT with the name or screenshots of each folder that they need.
   b. **Departmental Network Printer/Copiers** - What Printers/Copiers will this staff need to use?
   c. **Hyland OnBase** – Will this staff have any responsibilities within OnBase? If so, what role or functions will they need? Please specify.
   d. **Departmental Emails or Calendars** - Does your department have email accounts or internal calendars in Outlook that need to be added?
   e. **Departmental Directories/Listservs**
   f. **Additional Resources/Programs** – Inform SA-IT if your department uses any special software or programs that require access permission or installation. (Ex. Avaya Softphone, etc.)
   g. **CMS/CFS** - Anything relating to these will require a CARS request filled out by assigned/internal Analyst. Here is the CARS request page for additional information.
   Note: Access can take from 1 day to 1 week to go through. If more time has passed since access was identified, have the New Employee reach out directly to SA-IT and provide error messages and/or screenshots of missing access.
3. **Equipment funding -** Equipment for General fund positions is provided by SA-IT. Self-Support and externally funded positions need to purchase the position's equipment, an agreement for temporary use of equipment is available (*add reference here).*
4. **Contact SA-IT to schedule the New Employee's "Get to know your laptop" session –** Schedule a 40 min meeting (to take place within the first 3 days). During the session, SA-IT will sit down with New Employee and ensure they're logged in to appropriate software, finalize applicable configurations, and answer any questions they may have about the device(s).
5. **Purchase Additional Equipment (not under SA-IT purview)** - Headset, hotspot, webcam, etc.

On Employee's First Day(s)

SA-IT Responsibility (Relies heavily on Departmental Collaboration)

1. **Identify New Employee's Saclink ID to begin Access Configuration**– Pull from system or contact the Department Director and/or Hiring Manager and Dept Analyst (if any) for New Employee Saclink ID.
2. **Grant New Employee Access (PARTIAL/LIMITED)** –Based on Department responses (see 2 in Department Responsibilities above).

3. **1:1 - SA-IT meets with New Employee "Get to Know Your Laptop" Session (Can happen within first 3 days)** – SA-IT Team member will meet with New Employee in their office during the pre-emptively scheduled time set by the Department.

New Employee Onboarding Guide for Student Affairs Departments

Attachment B – Sample Onboarding Schedule

New Employee Name:	Department:
Onboarding Host/Lead:	Start Date:
Title:	Classification:

First Week Schedule

Monday/1st Day			
Time	**Action**	**Resources**	**Responsible Individual**
8am – 8:15am	Meet employee and ensure they have parking permit Walk them to HR's New Employee Orientation	Welcome Center	Manager/Lead /Host
8:15am – 9:00am	HR New Employee Orientation – in person component	Welcome Center	HR
9:00am – 9:15am	Meet candidate after orientation Show employee where they can attend the Zoom portion of orientation		Manager/Host/Lead
9:15am – 12:00pm	HR New Employee Orientation	Zoom	HR
12:00pm-1:00pm	Lunch with Manager/Host/department to welcome employee		Manager/Lead/Host
1:00pm – 2:00pm	Show employee workstation Allow them to get familiar with workstation and complete their Saclink email setup and computer setup/Administrative Onboarding	Saclink setup: https://saclink.csus.edu Voicemail: Phone Service	Manager/Host/Lead
2:00pm – 3:30pm	Meet with full department and other contacts the position works with		Department employees/ other contacts
3:30pm – 4:00pm	Obtain One Card from Bursar's Office	Lassen Hall 1003	Bursar's Office

Time	Action	Resources	Responsible Individual
4:00pm-4:30pm	Key Request	Facilities	Manager/Lead/Host
4:30pm-5:00pm	Check in with Manager/Lead		Manager/Lead

Tuesday, 2nd Day			
Time	**Action**	**Resources**	**Responsible Individual**
8:00am- 8:15am	Check in with Manager/Lead		Manager/Lead
8:15am-8:30am	Get settled into workstation		New Employee
8:30am- 10:30am	Have discussion with supervisor (suggested topics on page 4 of guide) Discuss Affinity groups and perks (see resources at the end of this document)		Manager/Lead/Host
10:30am-12:00pm	Shadow staff with a similar role		Other staff
12:00pm-1:00pm	Lunch		New employee
1:00pm-2:00pm	Review processes and policies pertinent to position, including Safety & Emergency information	Position specific	Manager/Lead
2:00pm – 3:30pm	Shadow staff with a similar role		Other staff
3:30pm-4:30pm	Work on any assignments	Position specific	New Employee
4:30pm-5:00pm	Check in with Manager/Lead		Manager/Lead
Wednesday, 3rd Day			
Time	**Action**	**Resources**	**Responsible Individual**
8:00am- 8:15am	Check in with Manager/Lead		Manager/Lead
8:15am-8:30am	Get settled into workstation		New Employee
8:30am-9:30am	Ensure new employee has correct calendar/shared drive/CMS Access	Position specific	Manager/Lead/Admin
9:30am-10:30am	Ensure all checklist items from HR are being completed		Manager/Lead/Admin

Time	Action	Resources	Responsible Individual
10:30am-12:00pm	Meeting with campus constituents		Manager/Lead
12:00pm-1:00pm	Lunch		New Employee
1:00pm-3:00pm	Complete Trainings in CSU Learn	Data Security and FERPA training CSU's Sexual Misconduct Prevention Program Illness Prevention Program Emergency Preparedness Active Shooter Discrimination Harassment Prevention Training Youth Protection Program, Procard and/or Concur Travel (if applicable)	New Employee
3:00pm-3:30pm	Ensure employee is added to appropriate list serves/meetings		Manager/Lead/Admin
3:30pm-4:00pm	Visit the Ergonomics site at: https://www.csus.edu/campus-safety/environmental-health-safety/safety-management/general-safety/ergonomics.html and review your station.	Contact Risk Management Services at (916) 278-2020 for additional information.	New Employee
4:00pm-5:00pm	Work on any assignments		New Employee

Thursday, 4th Day			
Time	Action	Resources	Responsible Individual
8:00am-10:00pm	Work on assignments/applicable trainings		New Employee
10:00am-12:00pm	Shadow staff in similar role		Other staff
12:00pm-1:00pm	Lunch		New Employee
1:00pm-3:00pm	Shadow staff in similar role		Other staff
3:00pm-4:00pm	Ensure all checklist items are complete		Manager/ Lead/Admin
4:00pm-5:00pm	Work on any assignments/check in with supervisor/lead		New Employee

Friday, 5th Day			
Time	Action	Resources	Responsible Individual

8:00am-9:00am	Compile list of questions		New Employee
9:00am-11:00am	Shadow staff in similar role		Other staff
11:00am-12:00am	Work on any assignments		New Employee
12:00pm-1:00pm	Lunch		New Employee
1:00pm-2:00pm	Work on any assignments		New Employee
2:00pm-3:00pm	Meet with Manager/Lead to work on expectations and answer any questions		Manager/Lead
3:00pm-5:00pm	Sac State 101	CSU Learn	New Employee

New Employee Checklist for Student Affairs Departments

Attachment C - Resources and Information

New Employee Name:	Department:
Onboarding Host/Lead:	Start Date:
Title:	Classification:

Resources and Information on some of the benefits to being a Hornet

CSU Total Compensation Calculator

https://www.calstate.edu/csu-system/careers/compensation/Pages/compensation-calculator.aspx

Employee Affinity Groups

https://www.csus.edu/division-inclusive-excellence/employee-affinity-groups/

Employee Wellness

https://www.csus.edu/wellness/employee-wellness/

Hornet Express Shuttle

https://www.csus.edu/parking-transportation/shuttle/

Sacramento RT Commuter Sleeve

https://www.csus.edu/parking-transportation/alternative-transportation/commuter-sleeve.html

OneCard Discounts

https://www.csus.edu/administration-business-affairs/onecard/card-uses.html

Staff Talent Appreciation & Retention (STAR) Awards Program

https://www.csus.edu/student-affairs/star-awards.html

University Staff Assembly Events/Committee

https://www.csus.edu/president/university-staff-assembly/

Campus Sponsored Professional Development

https://www.csus.edu/administration-business-affairs/human-resources/learning-development/

https://www.trumba.com/calendars/sacramento-state-events?trumbaEmbed=filterview%3DFeaturedEvents#/?i=8

Campus Events Calendar (select event categories on the left-most column of the page)

https://www.trumba.com/calendars/sacramento-state-events?trumbaEmbed=filterview%3DFeaturedEvents#/?i=12

New Employee Checklist

Dear <Employee Name>,

Congratulations on your acceptance of your new position at Sac State! Here are some key things you will need to know before your first day:

- Your Sac State ID # is <Number>. Please have this accessible as it will be necessary for several aspects of your employment.
- Per the CSU COVID-19 Vaccination Policy, it is strongly recommended that all California State University, Sacramento employees who are accessing office and campus facilities follow COVID-19 vaccine recommendations adopted by the U.S. Centers for Disease Control and Prevention (CDC) and the California Department of Public Health (CDPH) applicable to their age, medical condition, and other relevant indications.
- Your Offer Letter and Position Description are attached to this email. After New Employee Orientation, I will send these documents via AdobeSign to collect your signature, along with the Child Abuse and Neglect Reporting Act Acknowledgement (also attached).
- If desired, you will be able to purchase your Employee Parking Permit at the Welcome Center. You will need the License Plate numbers of up to two vehicles you would like associated with your parking permit.
- On <Date> at 9:15 AM, we will begin the Zoom portion of New Employee Orientation with presentations from Human Resources representatives and possibly your Employee Union. Please see Zoom Invite information below:
  Join Zoom Meeting
  <Zoom Link>
  <Meeting ID>
- New Employee Orientation usually ends around 12:00PM.
- Please review the other documents attached to this email for your reference.

The Office of Human Resources seeks to ensure that all of our events are inclusive and that all attendees are able to fully participate. Individuals who require a reasonable accommodation to participate in NEO should contact the Benefits Office at 916-278-6213 or benefits@csus.edu as soon as practicable.

Sac State would also like to take this opportunity to inform you about public safety issues on campus in compliance with the *Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistic Act:*

Pursuant to the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act, the current Annual Security Report (ASR) is available for viewing at www.csus.edu/clery. The ASR contains the current security and safety-related policy statements, emergency preparedness and evacuation information, crime prevention and sexual assault prevention information, and drug and alcohol prevention programming. The ASR also contains statistics of Clery Act crimes for Sacramento State for the last three (3) calendar years. Paper copies are available upon request at the Police Service Center located in the University Union.