

Practice Directive: Onboarding/Offboarding Employees

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Onboarding/Offboarding Practice Directive

Division: Finance and Administration
Department: Human Resources
Contact Information: Chief Human Resources Officer/David Miller/715-836-4323 or milleda@uwec.edu
Effective Date: 2/1/2022
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Objective:

The purpose of this practice directive is to identify the multiple resources, procedures, and workflow pertaining to onboarding and offboarding of the employees of UW-Eau Claire (UWEC).

Scope:

The scope of this procedure is to direct employees and managers through the onboarding and offboarding process, thereby increasing the familiarity with UWEC and decreasing the time to productivity.

Definitions:

Onboarding - A program that focuses on new employees and helping them achieve more, in less time. The UWEC program includes an online and in-person portion as well as the introduction to the department.

Offboarding - The process used when an employee resigns, retires, or is leaving UWEC. This

process includes completion of the notice to HR and other departments and the completion of a checklist for the employee.

Procedures:

- [UWEC Webpage - New Employees](#)
- [UWEC Webpage - FASTER](#)
- [Onboarding for Managers](#)

Onboarding Employees

Employee Procedures

Step	Action
1.	You will receive three emails: one for accessing your email account, one for completing your I-9, and one for completing your Criminal Background Check. Follow the instructions to complete these tasks. Employees <u>must</u> have these completed to begin work.
2.	Upon receipt of the account confirmation email, follow the link to the Just in Time Online Orientation program. Review the orientation for more information regarding UW Eau Claire and the many areas of the campus.
3.	Go to the UW Eau Claire website page New Employees to view the checklist listing things to do before your first day, your first day, your first month, and beyond.
4.	Participate in the Firstsource Onboarding on your first day. Get your Blugold ID, activate your UW Eau Claire username and email account, register for the emergency notification system, and obtain a parking permit, if applicable.
5.	Meet with your department supervisor to learn about your position, tasks, and your department.
6.	An email notice from UW-System will be sent to you for the completion of the Mandatory Training including Sexual Harassment (Title IX), Information Security, Mandated Reporter, Diversity, and COVID-19 training (if applicable). Trainings must be completed within 30 days of the date of notification.

Manager Procedures

Step	Action
1.	Utilize the Onboarding for Managers checklist to prepare for the new employee.
2.	Develop a training plan for the new employee for their first 90 days (Included in the Onboarding for Managers document.)
3.	Verify your employee has completed the steps for the I-9 and Criminal Background. Employees <u>must</u> have these completed to begin work.
4.	Schedule the Firstsource Onboarding for the employees first day. They can then get a Blugold ID, activate their UW Eau Claire username and email account, register for the emergency notification system, and obtain a parking permit, if applicable.
5.	Meet with the employee to explain the position, tasks, department, and get them started on training.
6.	Introduce the new employee to the team and their “Buddy”, if applicable.

Offboarding Employees

Employee Procedures

Step	Action
1.	Upon resignation, retirement* or leaving UW Eau Claire, submit a letter or email of resignation to your supervisor. It is recommended this be submitted at least two weeks in advance for University Staff and 30 days or more for Academic Staff and Faculty, if possible.
2.	Your supervisor or you should complete and submit the BP Logix form Employee Resignation - Separation - Retirement - Transfer Form .
3.	You will receive the Separation Checklist to be completed before you leave UW Eau Claire.

4.	An Employee Experience Interview will be scheduled with Human Resources. A meeting invitation will be sent for the interview prior to your departure. If the interview is not done prior to departure, expect a call to complete the interview.
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*If retiring, contact Human Resource (715-836-5260) prior to your last day on campus to determine benefits and complete any paperwork required for retiring.

Manager Procedures

Step	Action
1.	Upon receiving a notice of resignation, retirement or leaving UW Eau Claire, you, or the employee, should complete the appropriate sections of the form and submit it. Employee Resignation - Separation - Retirement - Transfer Form .
2.	The employee will receive the Separation Checklist to be completed before you leave UW Eau Claire.
3.	An Employee Experience Interview will be scheduled with Human Resources. A meeting invitation will be sent for the interview prior to the employee’s departure. If the interview is not done prior to departure, a call will be made to complete the interview.

Administration:

Approval Details

Approval Authority:	[Refer to the Table of Approval Authorities]
Approval date:	[dd/mm/yyyy]
Version no:	V1.0
Date for next review:	[The practice directive and procedure review should be scheduled 3 years from the approval date]

Revision History

Version	Revision date	Description of changes	Author
1.0	<dd/mm/yyyy>	Procedure established	Title of Procedure Author

Contact Person/Unit

Contact Person/Unit:	Human Resources Coordinator/Jeannine Buch/715-836-5389 buchja@uwec.edu Human Resources Specialist/Karen Callaway/715-836-4202 callawkl@uwec.edu
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Keywords

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