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**WEST VIRGINIA  
CLINICAL & TRANSLATIONAL SCIENCE INSTITUTE**

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## **(2.4) Onboarding & Offboarding**

### **Overview**

The West Virginia Clinical & Translational Science Institute realizes the importance of supporting newly hired employees for long term success. When new staff are hired, the administrative core of the WVCTSI will ensure a smooth transition in an efficient and effective manner. WVCTSI shall also ensure a smooth transition for those WVCTSI staff leaving the institution.

### **Purpose**

The purpose of this policy is to identify the procedure by which a new WVCTSI staff member is on-boarded and a departing staff member is off-boarded.

### **Scope**

This policy applies to all administrative and professional staff funded in part or in whole by the WVCTSI.

### **Clarification**

Administrative and professional individuals employed by WVCTSI agencies/partner sites should follow their institutional policies and procedures regarding on boarding and off boarding. The policy detailed here applies to central staff of the West Virginia Clinical and Translational Science Institute.

### **Definitions**

Staff – administrative or professional personnel whose primary appointment rests with the West Virginia Clinical and Translational Science Institute

Agencies – West Virginia University, West Virginia University Research Corporation, West Virginia University Healthcare doing business as WVU Medical Corporation or University Health Associates, Charleston Area Medical Center, WV School of Osteopathic Medicine

## **Policy**

The WVCTSI Finance Office must be notified of all WVCTSI staff being hired or terminated.

Once the decision to hire or terminate an employee has been made, the WVCTSI Administrative Office, including Director/PI, Director of Strategic Operations, Director of Research Administration, and Finance Manager must be notified immediately of the effective date of such action.

## **Procedures**

The hiring supervisor should send notification to WVCTSI Finance Manager when hiring or terminating an employee to coordinate appropriate onboarding and offboarding as necessary for proper payroll processing.

The position description for the newly hired personnel should also be provided electronically to the Strategic Operations Director prior to the start date.

### **Onboarding an Employee:**

1. When the hire is confirmed, the hiring supervisor should contact the prospective staff member to welcome him/her, detail the reporting location, and discuss the expected work schedule.
2. The hiring supervisor will lead the preparation of the workspace for the employee's arrival, with support from the office program assistant.
3. The hiring supervisor will share with the newly hired staff member the appropriate human resources organization policies and procedures, along with institutional policies and procedures.
4. The hiring supervisor will work with the WVCTSI administrative support staff to arrange the following with the appropriate Office of Information Technology or other office/department:
  1. Email account
  2. WVUID account
  3. MAP/Oracle access, if applicable
  4. Computer Purchase, Installation and/or Set-up
  5. Phone & TID (long distance code) numbers

6. Access to drives, networked printers/scanners, and any other equipment
5. Parking
  1. The hiring supervisor will inform the employee of temporary parking options they may consider or be given
  2. The new employee will visit the WVU parking office upon hire to identify permanent parking plans. Parking permits are assigned based on availability.
6. Employee Identification and Building Access
  1. The hiring supervisor will instruct the new employee to visit the West Virginia University ID Office within three days of start date for photograph and creation of the appropriate staff identification card/access card.
  2. The WVCTSI Program Assistant will provide keys for work specific areas/doors.
  3. Once an ID card has been issued to the employee, the supervisor and staff member will work with the WVCTSI program assistant to have appropriate digital permissions added to employee ID card
7. Research Corporation credit card and/or State P-Card, if applicable
  1. The hiring supervisor will request any necessary procurement cards through the WVCTSI Finance Manager. The Director of Research Administration will approve the issuance of new procurement cards.

### **Offboarding an Employee:**

In the case that a WVCTSI staff member leaves the organization, the following steps will be taken:

The supervisor will:

1. Submit request to Finance Manager to remove employee from payroll
2. End email access and place forwarding rule on the account
3. Retrieve keys on the final day of employment
4. Retrieve WVUID on the final day of employment
5. Remove building and office access
6. Retrieve laptop computers on the final day of employment
7. Direct employee to return to WVU Parking

The Finance Manager will:

8. Remove MAP/Oracle access, if applicable
9. Cancel TID (long distance code) numbers and reset voice mail on the final day of employment
10. Cancel state and/or Research Purchasing Cards on last day of employment

Administrative/Support Staff will:

- 11. Remove access to drives, networked printers/scanners, and any other equipment on the day after the final day of employment.

## Roles and Responsibilities

The responsibility for interpretation of this policy rests with the Director of WVCTSI.

## References and Authority

- WVU Research Corporation Employee Handbook located at: <https://hr.research.wvu.edu/files/d/06447ed4-1dd4-4d76-bbbc-add4d58cf66e/Handbook.pdf>
- WVU Human Resources Policies located at: <http://www.hr.wvu.edu/policies>

## Approval and Authority to Proceed

I approve the project as described above, and authorize to proceed.

Name	Title	Date
Sally L. Hodder, MD	Director, West Virginia Clinical and Translational Science Institute	4/18/2016



Approved By Date