



POLICY PERSPECTIVES

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ONBOARDING PROCEDURES FOR NEW EMPLOYEES DRAW FROM MANY POLICY AREAS; MAINTAINING A CHECKLIST CAN HELP THINGS GO SMOOTHLY

Every August, most school districts have an influx of new employees who are starting their position in connection with the fall school term. Both the school district and the new staff members benefit from a smooth, well-organized onboarding process. A school district certainly wants to make a positive first impression that projects a welcoming work environment in which new employees have the information and assistance they will need for a successful start. However, oversights and omissions during onboarding can cause more than just minor frustrations. Hours of productivity can be lost fixing issues, employees can be tremendously disadvantaged by misunderstandings or errors associated with enrollment in district-offered benefits, compliance with legal and policy requirements can be jeopardized, and some aspects of onboarding can directly impact school safety and student instruction and learning.

Given the range of policy, operational, and compliance areas implicated by the onboarding process, it can be very helpful to develop a local onboarding checklist that starts with core items that apply to all (or at least most) positions and that is then further customized for different roles and positions. As is likewise true for the onboarding process as a whole, districts need to take a cross-functional approach to developing and implementing such a checklist. In other words, it should not be viewed solely as a function/responsibility of the business office or human resources department.

An onboarding checklist is also something that can easily become outdated and that will almost always be incomplete—or at least able to be improved. Accordingly, the checklist(s) should be regularly reviewed and updated. In the review process, use feedback and input provided by staff members who recently went through the onboarding experience.

Ideally, a checklist will be derived from and coordinated with a more comprehensive onboarding program and perhaps even a new employee orientation handbook.

The following list can be used as a starting point for developing a locally driven onboarding checklist:

- Federal Form I-9, “Employment Eligibility Verification”
- Federal Form W-4, “Employee’s Withholding Certificate”
- Wisconsin WT-4, “Employee’s Wisconsin Withholding Exemption Certificate”
- Submit a “new hire report” to the Wisconsin Department of Workforce Development, either electronically or via the WT-4
- Authorization for direct deposit of payroll
- Signed voluntary election for a school year employee to receive pay over 12 months (a voluntary election for this payroll option is required by law, but only if the district chooses to offer the option to its school year employees)
- Wisconsin Retirement System enrollment (if applicable to the position)
- Health, dental, and other insurance enrollment (if applicable to the position), or other cafeteria plan election (such as cash in lieu of insurance), if offered

- Enrollment in any Health Savings Account (HSA) or Health Reimbursement Account (HRA), if applicable in the district
- Any salary reduction agreements, such as:
 - Flexible Spending Arrangements under a cafeteria benefits plan
 - Elective contributions to a section 403(b) or section 457 plan
- Verification of a completed and acceptable background check, whether required by law or by local policy
 - Obtain consent for the background check if required under the Fair Credit Reporting Act (e.g., for certain background checks completed by a third-party service)
- Verification of a completed new employee medical examination (typically post-offer, pre-employment physicals that, at a minimum, satisfy the requirements established under section 118.25 of the state statutes)
- Verification that the employee has provided his/her emergency contact information
- For any employee employed under an individual contract, verification that a fully executed contract is on file
- For any employee who is employed under a letter of assignment, verification that the letter describing the assignment was provided to the employee and, if consistent with local practices, that the employee provided a signed acknowledgement of receipt
- For any employee whose position requires an active, valid license, verification that a copy of the current license is on file with the district
- The employee has returned a signed acknowledgement related to the receipt of the employee handbook/district policies
- A copy of the applicable job description has been provided to the employee
- A qualified mentor has been assigned when required by law (i.e., under PI 34) or when provided pursuant to district policy
- A district employee ID badge has been prepared and distributed
- Building access rights have been arranged (e.g., security card, electronic fob, or keys)
- Network access, email, and other account access have all been arranged, including adding the employee to applicable group distribution lists
- Any district-provided computer, cell phone, or other device has been configured
- Mandatory new employee training has been scheduled, as applicable to the position¹
- Other district-provided orientation activities have been scheduled. Such meetings and other activities might cover topics such as:
 - Building tours and related office procedures
 - Employee benefits
 - Employee evaluation processes
 - District technology and information systems, including key software/applications
 - District curricular and instructional standards
 - Key policies and procedures related to the employee’s position
 - The school safety plan
 - Ongoing “check-ins” for new employees
- An initial meeting between the employee and his/her immediate supervisor has been scheduled
- For a school bus or other CDL driver employed by the district:
 - Verification that the driver has registered for an account within the federal “Commercial Driver's License Drug and Alcohol Clearinghouse” database and provided consent for queries of the driver’s information within the database
 - A signed certificate of receipt and acknowledgement of educational materials addressing the district’s driver alcohol and drug testing policy and procedures is on file
 - Verification of completion of pre-employment testing for controlled substances and, if required under district procedures, a breath test for alcohol

¹ For examples of employee training mandates, please see https://wasb.org/mandatory_staff_training_requirements/ (WASB website login required) and <https://dpi.wi.gov/sspw/required-trainings>

PROPOSED REVISIONS TO THE TITLE IX REGULATIONS ARE NOW OPEN FOR REVIEW AND COMMENT; FINAL REGULATIONS ARE STILL MONTHS AWAY

The U.S. Department of Education has issued draft amendments to the Title IX regulations as a “proposed rule.” The proposed amendments are **open for review and public comment through September 12, 2022**. School districts may submit comments via the Federal eRulemaking Portal at <http://www.regulations.gov>. Any submissions should include the docket ID (ED–2021–OCR–0166) at the top, and the Department prefers for comments to be uploaded as a Microsoft Word file.

The Department will review all comments that it receives and then issue final regulations at some point (likely several months) after the public comment period closes. A key thing for school officials to know is that, at this time, schools should not make any policy changes based solely on the proposed regulations if the change(s) would conflict with the requirements of the current regulations.

Some of the main issues addressed in the draft regulations include the following:

- In comparison to the current Title IX regulations (last amended in 2020), the proposed regulations would substantially modify:
 - Notice mandates (e.g., school districts would be required to add a lengthy Title IX nondiscrimination notice to many school-related “announcements” and “bulletins”).

- Training mandates (e.g., schools would be required to provide Title IX training to all employees).
- The specific requirements for school district Title IX grievance procedures that provide for the prompt and equitable resolution of complaints of sex discrimination, including (but not limited to) complaints of sexual harassment. Relative to the current regulations, many (but not all) of the proposed changes in this area are likely to be viewed favorably by school districts. As one example, under the draft regulations, the same individual would be permitted to serve as the investigator and initial decision-maker for a Title IX complaint.

- The draft amendments expressly incorporate the Department’s current view of the scope of Title IX’s prohibition on sex discrimination within covered education programs and activities, including the Department’s interpretation that Title IX does prohibit discrimination on the basis of sex stereotypes, sex characteristics, pregnancy or related conditions, sexual orientation, and gender identity.
- The draft amendments would establish various rights and protections for students and employees who are pregnant or experiencing pregnancy-related conditions (including lactating).

Links to a complete copy of the draft regulations, to the Department’s associated commentary, and to a Department-prepared table that summarizes the major provisions of the proposed rule are available on the WASB’s website at: <https://wasb.org/policy/hot-policy-topics/2020-title-ix-regulations/>

The WASB is in the process of further evaluating the proposed regulations and will provide additional information to members in the near future.

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