

## Job Aid

# Onboarding checklist for new staff

This list includes the tasks a WIC coordinator and training supervisor must complete before a new staff member begins. Your organization will have additional onboarding steps. Start early – Citrix access can take time.

#	Onboarding Task	Checkbox
1.	Set up a local agency email address for the new staff member.	<input type="checkbox"/>
2.	<p>Request a Citrix access P number and state-assigned login from the State WIC office. Email WIC App Support (<a href="mailto:WIC.APP-SUPPORT@odhsoha.oregon.gov">WIC.APP-SUPPORT@odhsoha.oregon.gov</a>) and include the employee:</p> <ul style="list-style-type: none"><li>• Full name</li><li>• Job title</li><li>• Physical address</li><li>• Email address</li><li>• Phone number</li></ul> <p>The State Office of Information Services (OIS) and WIC App Support will email the new user their P number, state email, and password instructions. This may take up to one week.</p>	<input type="checkbox"/>

#	Onboarding Task	Checkbox
3.	<p>Have new staff member reset their password within 7 days. If they do not reset their password in time, use the <a href="#">password unlock instruction guide</a> or contact the OIS Service Desk for help at 503-945-5623.</p> <p>Password rules:</p> <ul style="list-style-type: none"> <li>• At least 15 characters</li> <li>• Must include: uppercase letter, lowercase letter, a number, and a special character (%@#\$!*?/+&lt;&gt;{}[]\).</li> <li>• Citrix passwords must be reset every 60 days (follow the <a href="#">password reset instruction guide</a>).</li> </ul>	<input type="checkbox"/>
4.	<p>Set up Multi-Factor Authentication (MFA) for Citrix. New staff need either a mobile device or YubiKey. Follow the <a href="#">MFA instruction guide</a> to register the Microsoft Authenticator app or YubiKey. The <a href="#">Oregon WIC MFA Questions and Answers</a> document is also available for help with this process.</p>	<input type="checkbox"/>
5.	<p>Create a TWIST User ID and password. Assign the correct TWIST user roles for their job.</p> <p>Resources:</p> <ul style="list-style-type: none"> <li>• Instructions to assign user roles: <a href="#">TWIST training manual, Chapter 6, Lesson 100</a>.</li> <li>• Policy on user roles and security: <a href="#">Policy 901 TWIST Data System Security</a>.</li> </ul>	<input type="checkbox"/>

#	Onboarding Task	Checkbox
6.	<p>Create a staff record in the TWIST Operations Module. Important: The User ID in User Roles and Operations Management must match exactly. See <a href="#">TWIST Training Manual, Chapter 8, Lesson 101</a>. for instructions.</p> <p>If the staff member is a certifier, assign:</p> <ul style="list-style-type: none"> <li>• Language spoken</li> <li>• Risk level</li> <li>• Clinic locations</li> </ul> <p>This allows them to be scheduled to see participants.</p>	<input type="checkbox"/>
7.	<p>Request Teletask access if the new staff member will text participants. Email WIC App Support (<a href="mailto:WIC.APP-SUPPORT@odhsoha.oregon.gov">WIC.APP-SUPPORT@odhsoha.oregon.gov</a>) with:</p> <ul style="list-style-type: none"> <li>• Employee's full name</li> <li>• Employee's email address</li> <li>• User level preference (chat user or leadership user)</li> </ul> <p>You can assign staff Teletask trainings available in Workday.</p>	<input type="checkbox"/>
8.	<p>Show the new staff person the <a href="#">WIC Staff Resources webpage</a>. Include:</p> <ul style="list-style-type: none"> <li>• <a href="#">Training modules and online courses</a></li> <li>• <a href="#">TWIST manual and training resources</a></li> <li>• <a href="#">Policy and procedure manual</a></li> </ul>	<input type="checkbox"/>

#	Onboarding Task	Checkbox
9.	<p>Help the new staff person <a href="#">set up a Workday Learning account</a>. They will need an email address. If there are problems setting up a Workday Learning account, email:</p> <ul style="list-style-type: none"> <li>• Joan Medlen, State WIC Office (<a href="mailto:joan.e.medlen@oha.oregon.gov">joan.e.medlen@oha.oregon.gov</a>)</li> <li>• WIC App Support (<a href="mailto:WIC.APP-SUPPORT@odhsoha.oregon.gov">WIC.APP-SUPPORT@odhsoha.oregon.gov</a>)</li> </ul>	<input type="checkbox"/>
10.	<p>Make sure the staff member can access all required training. All required modules, and posttests are in Workday Learning. Print versions of self-paced PDF courses may be ordered from the <a href="#">Oregon WIC Shopify store</a>.</p>	<input type="checkbox"/>
11.	<p>Schedule time for the staff member to complete required training. Use the <a href="#">Level 1 Training Checklist</a> and <a href="#">Level 2 Training Checklist</a> to plan time and track progress.</p>	<input type="checkbox"/>
12.	<p>Provide any additional training materials needed for training. Examples: Food List or materials specific to your clinic.</p>	<input type="checkbox"/>
13.	<p>Schedule time to meet regularly with the staff member during training. Use these meetings to support them as they complete the Certifier's Program.</p>	<input type="checkbox"/>