

New Employee Onboarding Checklist

"I am Welcomed,
Therefore I Belong!"



Directions: This checklist is designed to assist with the new employee's onboarding process. Onboarding is a long-term process that begins before an employee's start date and continues. It helps the new hire feel welcome and prepared in their new position. This checklist is organized chronologically and assists with the preparation of the arrival of the new employee. The department may add additional activities that are relevant to the new employee's position.

Employee's Name (please print) _____

Job Title: _____ Hire Date _____

| Supervisor | Office Admin | N/A | Quick List | Details |
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| Pre-Arrival – Without Employee ID# | | | | |
| | | | Call to Welcome New Hire | Call to officially welcome the new employee to NDSU after confirmation of acceptance. <ul style="list-style-type: none"> Provide information to a contact person in the event the new employee has a question or issue (Onboarding Peer is recommended) Let the new employee know where to park and report to on the first day, dress code, work day hours |
| | | | Send Announcement to Department | Send an announcement (i.e. email) to the department announcing the new hire and the start date. |
| | | | Schedule Benefit Session | A benefit session will be scheduled by the recruiter. If you have questions regarding the benefit session, please contact the appropriate recruiter. |
| | | | I-9 Completion | Ensure completion of the I-9 form <u>On-campus or Fargo area employees:</u> <ul style="list-style-type: none"> Section 1 - To be completed by employee no later than the 1st day of employment Section 2 – Document verification must be completed no later than the 3rd day of employment by HR/Payroll Staff <u>Off-campus and out of Fargo-area employees:</u> <ul style="list-style-type: none"> Section 1 - To be completed by employee no later than the 1st day of employment Section 2 – Document verification must be completed no later than the 3rd day of employment by Authorized Personnel or Notary Public |
| | | | Request Phone Service | Contact your department's Phone Counselor |
| | | | Computer Ordering & Set-up Information (for new or existing machines) | <ul style="list-style-type: none"> Check preferred computer hardware configurations at: www.ndsu.edu/its/hardware-standards Purchase selected computer from the Bookstore: www.ndsubookstore.com (Electronics) or call 231-7761 for assistance Contact your department's Software Contact to have PC imaged or re-imaged www.ndsu.edu/its/software-contacts |
| | | | Order Name or Door Plate | Departmental decision |
| | | | NDSU Name Badges | For guidelines, questions, or if you need information regarding appropriate format, or recommended vendor: <ul style="list-style-type: none"> Contact: VP University Relations, www.ndsu.edu/vpur 701.231.1068 Check website for instructions. |
| | | | Authorize Parking | Notify parking office that new employee is authorized to park in designated lot. Contact: Parking Office, 231-5771 http://www.ndsu.edu/parking/contact/ You may obtain a one-or two day temporary parking pass for convenient first day arrival. |

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| | | Work Space | Organize work space and order supplies |
| | | Update Website Info | Department responsibility |
| | | Prepare List of Contacts | Prepare a list of contact information (names of staff, job titles, job duties, contact information) and other contacts across campus. Frontliner's Contact List: http://www.ndsu.edu/fileadmin/hr/docs/ndsucontacts.pdf |
| | | Prepare Welcome Packet | Have information available to go through and discuss with the new employee on their first day (Meeting with New Employee). Some suggestions: <ul style="list-style-type: none"> • Campus Map • University and Department Organizational Charts • Campus Contact Lists • Leave Slip/Time Sheet (if applicable) • Floor plans of Memorial Union (Conference Rooms) • Holidays and Break Times (if applicable) • Injury Report |
| | | Schedule New Employee/ Faculty Orientation Session | This is the day-long quarterly orientation with Human Resources and NDSU President. You may contact Human Resources/Payroll to schedule your new employee for an upcoming session. <ul style="list-style-type: none"> • Contact: Human Resources/Payroll 701.231.8961 ndsu.hr@ndsu.edu For Faculty: This is an annual orientation in August sponsored by the Office of the Provost. <ul style="list-style-type: none"> • Contact Associate Provost office/ Kelly Hoyt 701-231-6671 kelly.hoyt@ndsu.edu |
| | | Reimburse Moving Expenses (if applicable) | Check with your Vice President to see if applicable Please refer to Policy 171 at www.ndsu.edu/policy |
| Pre-Arrival – after you receive the Employee ID# | | | |
| Access and Authorizations: (IT Services, Building Access, Miscellaneous) | | | |
| | | Automated IT Services (enroll) | As part of the new hire process, they will claim their NDUS account and obtain an employee id number. Within 24-48 hours of “enrolling” the employee will automatically receive access to: <ul style="list-style-type: none"> • E-mail address • Wireless access • Desktop Auth (cluster and Novell login) • Blackboard • Library services If this doesn't work, contact the Help Desk ndsu.helpdesk@ndsu.edu or 231-8685. |
| | | Departmental IT Services | Services that are specific to the department need to be requested from the Help Desk by the employee's supervisor. Send request to ndsu.helpdesk@ndsu.edu Such service requests include, but are not limited to: <ul style="list-style-type: none"> • Department shared drives (S: drive) • Content Management System (Typo3 – Website creation/editing) • ImageNow • File (U: drive or personal drive) • Calendaring (Oracle or GroupWise) |
| | | Request Building Access – Keys or Card Access | Contact your department's Key Control Person http://www.ndsu.edu/its/help_desk/account_hub/new_stafffaculty_account_setup/ link to the appropriate PDF form(s) |
| | | Authorize FAMIS Discoverer Reports Access and Information about FAMIS | If applicable, authorize access to the FAMIS Discoverer Reports (billing reports) http://www.ndsu.edu/fileadmin/vpfa/forms/FM-NDUS_FMS_SelfServiceRequest.pdf link to the appropriate PDF form |
| | | Order Business Cards | Order online at: http://www.ndsu.edu/printandcopy/job_submission (must have employee ID and email address prior to ordering business cards) |

| Miscellaneous Services: (add departmental specific items) | | | | |
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| | | | Dept LISTSERV | Make sure employee is added to the appropriate department LISTSERV(S). |
| First Day | | | | |
| | | | Greet New Employee | Show the new employee their workspace |
| | | | Introductions | Introduce the new employee to co-workers, other employees in the building and others (Suggestion: have a welcome coffee break or lunch with all employees) |
| | | | Department Tour | Provide a tour of the department including critical areas such as time clock, mailboxes, break area, restrooms, office supplies, copiers, fax machines, printers, etc. |
| | | | Campus Tour | Provide a tour and map of the campus. Some suggestions to include in the tour: <ul style="list-style-type: none"> • Dining services • Departments the new employee will work with closely • Wellness Center • Memorial Union (Conference Rooms) • Library • Facilities Management (parking, motor pool) |
| | | | Obtain Parking Permit | Assist employee with obtaining their parking permit http://www.ndsu.edu/parking/ |
| | | | Bison Card (Employee ID) | Assist employee with obtaining their ID card. Bison Card Center – Memorial Union www.ndsu.edu/bisonconnection/bisoncard |
| | | | Meeting with Employee | Meet with the employee to discuss university and department protocol/information: <ul style="list-style-type: none"> • Information in Welcome Packet • Dress code • How to fill out time sheets, use KRONOS or other • Department hours and employee's work hours, lunch/break times (Refer to Policy Manual http://www.ndsu.edu/policy-Policy 137 Holidays; 213 Rest Periods; 214 Work Week) • Payroll schedule, overtime policy (if applicable), etc. (Policy 129 Salary Administration Policy, 212 Overtime) • Annual/sick leave policies and processes for requesting time off or reporting absences (Policies to reference: 130, 135, 139, 143, 146, 147, 149) • Customer service philosophy, response time and phone etiquette, culture, dept. mission • Department communication process, staff meetings, emails, etc. • Training (phone use, copy machine codes, programs, professional development) • Tuition waivers (Policy 133, 133.1) • Email is the Official Communication Method for Employees (Policy 158.1) |
| | | | Academic Oath (Faculty) | Have new faculty member sign the academic oath that is located at http://www.ndsu.edu/fileadmin/provost/Academic_Staff_Oath.pdf and put a copy in the personnel file. |
| Access and Authorization to Systems: | | | | |
| | | | PeopleSoft Access – Finance | Prerequisite: PeopleSoft Data Privacy Training *New employees who require Accounts Payable entry access will be required to attend a training session with the PeopleSoft Financial Systems Trainer before any AP entry can be completed. Please contact NDSU.Accounting@ndsu.edu For instructions on requesting access visit: NDSU.Accounting.PS@ndsu.edu |

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| | | PeopleSoft Access – HRMS | <p>Prerequisite: PeopleSoft Data Privacy Training http://community.ndus.edu</p> <p>Once logged in with the NDUS credentials, Choose “NDUS Employee Development” Choose “NDUS Data Privacy Training” Follow the instructions on the pages.</p> <p>Supervisor sends email to ndsuh@ndsuh.edu which includes:</p> <ul style="list-style-type: none"> • Roles the new user will need • Departments they need to access • Name (First, Middle Initial, Last) • Employee ID • Phone Number • Email Address |
| | | PeopleSoft Access – Student | <p>Prerequisite: PeopleSoft Data Privacy Training http://community.ndus.edu</p> <p>Once logged in with the NDUS credentials, Choose “NDUS Employee Development” Choose “NDUS Data Privacy Training” Follow the instructions on the pages.</p> <ul style="list-style-type: none"> • Go to https://www.ndsu.edu/registrar/facstaff/access/ and walk through the steps and find the appropriate security access form. |
| | | Request Online Employment System (PeopleAdmin) Access (if applicable) | <p>The Online Employment System (PeopleAdmin) is the online hiring system: https://jobs.ndsu.edu/hr</p> <p>If applicable, the supervisor must send an email to request access to: ndsuh@ndsuh.edu</p> <p>Include employee name, level access to be assigned, and department number(s) the user will need access to</p> |
| | | Self-Service | <p>Allows an employee to: view pay advice, benefits, personal information, leave accrual, etc.</p> <ul style="list-style-type: none"> • Employee receives email from the PeopleSoft Help Desk with instructions on how to claim the user ID and password (occurs after they have been hired into HRMS) • Contact PeopleSoft Help Desk for login issues (866-457-6387) <p>Self-Service guide http://sits.ndus.edu/archive/connectnd.ndus.edu/fileadmin/connectnd.ndus.edu/PDF/Self_Service_Manual_-_Employee_090311.pdf</p> |

Within the First Week

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| | | Have employee sign Position Description and submit to Human Resources/Payroll (Faculty –submit to Dean’s office for inclusion in official personnel file) | <p>Review Position Description/Duties/Responsibilities and then have employee sign the Position Description and submit it to Human Resources/Payroll (Related policies: http://www.ndsu.edu/policy Policy 101 Personnel Definitions, 101.1 Employee Group Definitions; Broadbanding Policy 241 www.ndsu.edu/broadbanding)</p> |
| | | Have employee sign the Responsibility Review form and submit to Human Resources/Payroll (if applicable) | <p>Meet with Employee to discuss Performance Expectations</p> <ul style="list-style-type: none"> • Explain 6 month probationary period and extension option for cause (Related policy: http://www.ndsu.edu/policy Policy 222) • Review mission of the university and department and how this position fits into those missions • Review departmental operations • Review Responsibility Review form, set goals and action steps • Discuss training process |
| | | Emergency procedures | <p>Explain the emergency broadcast system, how it works, and what to do. Discuss other emergency preparedness procedures for your department.</p> |
| | | Purchasing Card (if applicable) | <p>These are not applicable to all positions.</p> <ul style="list-style-type: none"> • Purchasing Policy, Agreement and User Manual http://www.ndsu.edu/purchasing/procurement_card/ |

| Training, Safety, Policy Review: | | | |
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| | | Mandatory Safety Training, and other Safety/General Health | Have employee complete safety training online or attend a session annually. For more information on safety, security and general public health: https://www.ndsu.edu/police_safety/annual_notices_and_training/ Also on this page you can link to <i>Training Requirement List (PDF)</i> for safety training applicable for specific job requirements. Related policies (http://www.ndsu.edu/policy): Policy 144, 153, 155, 164 |
| | | Mandatory Preventing Sexual Harassment/Title IX Sexual Misconduct Training | Have employee complete harassment training online (must be completed within 30 days of employment and annually thereafter) https://community.ndus.edu/login/index.php (login using the NDUS username and password used to view paycheck or class schedule in PeopleSoft Related policies (http://www.ndsu.edu/policy): Policy 162, 163, 163.1 |
| | | Annual Training For NDSU Employees | This is the list of trainings that need to be completed annually: https://www.ndsu.edu/hr/training/annual_training/ |
| | | Review NDSU Policies | Policy Manual: www.ndsu.edu/policy <ul style="list-style-type: none"> Reference key issues with FERPA, HIPPA, Acceptable Use & Confidentiality General policies (http://www.ndsu.edu/policy): Policy 151–Conflict of Interest; 158 – Acceptable Use of Electronic Communications Devices; 161 -Fitness for Duty; 169 – Employee Misuse of Property Reports; 181 –Resignation; 240–Changing positions; 406– Surplus Property; 700 –Service & Facilities Usage; 710–Computer & Electronic Communications Facilities |
| | | Grant Resources and Access | If you have questions or need assistance regarding research-related activities, please email NDsu.research@ndsu.edu or call 231-8045. For an overview of how NDSU research administration works, see the “Research 101” slideshow at: http://www.ndsu.edu/research/pdf/NDsUResearch101.pdf |
| On a Regular Basis | | | |
| | | Be Available for Questions | Meet regularly to answer questions |
| | | Job-Related Behaviors | Document and address specific job-related behaviors, both positive and negative. Immediately provide feedback on areas for improvement as problems occur. Openly praise positive behavior and good performance. |
| | | Job-Related Staff Issues | Related policies (http://www.ndsu.edu/policy): Policy 220, 232 – Job Discipline/Dismissal; Policy 156, 157, 230, 231 – Grievance & Appeal |
| Six Months (Staff) | | | |
| | | Staff Responsibility Reviews | Conduct 6-month probationary Responsibility Review. Related policies (http://www.ndsu.edu/policy): Policy 221 and 222 |
| Miscellaneous (add departmental specific items) | | | |
| | | Junior Faculty Mentorship Program (Faculty) | Sponsored by the FORWARD group –contact: ndsu.forward@ndsu.edu |
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A copy of this form should be provided to the new employee for their reference.