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New Employee Onboarding Checklist for Managers

Onboarding is a long-term process that begins before an employee's start date and continues for at least six months. This checklist is organized chronologically to help hiring managers prepare for the arrival of new employees. Once an employee starts, he/she can work together with the hiring manager and an onboarding peer to complete the checklist. The hiring manager may add additional activities that are relevant to the new employee's area.

Pre-Arrival

- ☐ Print out this checklist, review and customize if applicable.
- ☐ Confirm offer letter was sent to new employee, either by Human Resources or Hiring Manager.
- ☐ Call to officially welcome your new employee to NU after confirmation of acceptance.
- ☐ Provide new employee with a contact in the event of a question or issue.
- ☐ Contact Ryan Soard at 3-0716 to request: 1) an office space if the employee's position is new, 2) a key for the new office, 3) phone setup, and 4) a nameplate.
- ☐ Contact NUIT at 3-7000 to set up computer, printer, and login password access.
- ☐ Work with department contact to place an order for business cards.
- ☐ If necessary, order basic office supplies according to usual departmental process.
- ☐ Make note of the date on which employee will attend the New Employee Orientation Part 1 and ensure that this does not conflict with department schedules.
- ☐ Please note the importance of the Personal Data Form in creating the NetID. The employee will be instructed by central HR and Law School HR to submit the personal data. After HR has received and processed the form (please allow two days)
- ☐ Send an email to the applicable law school community announcing the new hire and start date.

Additional Activities for Nonresident Alien Status:

- ☐ Send informational web links to new employee and request that he/she fill out the forms if applicable. Go to http://www.northwestern.edu/international and click Faculty and Staff
- ☐ Contact the International Office at 847-491-5613.
- ☐ Contact Chicago Payroll at 312-503-9700 to register to use the Foreign National Information System. For more information, visit http://www.northwestern.edu/hr/foreign-nationals/

Northwestern
PRITZKER SCHOOL OF LAW

First Day

- ☐ Ensure that new employee has gone to the HR office in Abbott Hall as instructed to complete W-4, I-9, and Personal Data Form if necessary; sign employment application; and receive staff handbook and benefits packet.
- ☐ Remind new employee to complete the online benefits enrollment within the first 31 days of employment (must have NetID and password). Typically, it is best to enroll after attending New Employee Orientation, Part 1.

Department Onboarding

- ☐ Introduce to co-workers.
- ☐ Distribute assigned key and/or access card to office. Visit Administrative Services to obtain office key if not obtained prior to arrival.
- ☐ Discuss procedures for scheduling time off and unexpected absences.
- ☐ Review work schedule, office hours, pay schedule, and overtime policy if applicable. Refer employee to Kronos Time System information and tutorials available at http://www.northwestern.edu/hr/current-employees/using-kronos-time-entry/index.html
- ☐ Review appropriate attire for workplace, including any "casual Friday" or similar policies.
- ☐ Go over phones, fax, copier, and office supply locations and procedures.
- ☐ Provide or appoint an onboarding peer to give NU computer orientation at desk, demonstrating computer sign-in, shared drives on network, Outlook/collaboration tools, law school and departmental websites.
- ☐ Give a department tour, or appoint onboarding peer to provide the tour. Be sure to point out the nearest washroom and water fountain, place to hang coat, vending machine, pantry/kitchen, emergency exit, department copiers and printers, supply closets, as appropriate.
- ☐ Arrange a welcome lunch for new employee.

Within First Week

- ☐ Ensure that employee activates NetID online as soon as possible at www.northwestern.edu/facstafflogin
- ☐ Ensure that employee obtains his or her WildCARD. Photo identification and activated NetID are required for employee to obtain card. The WildCARD office is located on the first floor of Abbott Hall, extension 3-0548.

Communicate Job Expectations and Review Departmental Procedures

- ☐ Review job responsibilities, competencies, and expectations
- ☐ Review performance feedback and appraisal process using Performance Excellence process, visit http://www.northwestern.edu/hr/workplace-learning/performance-excellence/index.html

- ☐ Review organization of the department, critical members of the department, staff directory, department calendar, and confidentiality of information.
- ☐ Review University Standards for Business Conduct (nondiscrimination, no smoking, drug and alcohol, no tolerance of workplace violence, sexual harassment prevention and resolution).
- ☐ Review department safety plan and emergency regulations.

Systems Access

- ☐ If applicable, complete Project Café Security Access Forms for access to University financial systems and submit to the law school finance team in Administrative Services; allow up to 5 days for processing. The form is available at http://cafe.northwestern.edu/security/
- ☐ If applicable, set up access to Student Enterprise Systems: http://ses.northwestern.edu/
- ☐ If applicable, set up FASIS, VISTA, Deployment and Cognos Position Management: http://www.northwestern.edu/hr/policies-forms/forms/fasis-systems/

Training (as applicable)

- ☐ Consult Project Café Training course matrix and direct employee to enroll in appropriate courses. http://cafe.northwestern.edu/training/matrix.html
- ☐ For FASIS training, use FASIS Self-Service at https://nuhr.northwestern.edu .(Under the Learning and Development folder, click Request Training Enrollment and then click Search by Course Name. Type in FASIS and hit search; all scheduled courses for FASIS will be listed.)
- ☐ For eRecruit training, sign up at http://www.northwestern.edu/hr/workplace-learning/fasis-systems/erecruit-workshops.html
- ☐ Other workshops and training: http://www.northwestern.edu/hr/workplace-learning/course-listing.html

Within Two Weeks

- ☐ Ensure that employee attends New Employee Orientation, Part 1 for complete introduction to benefits, work schedule and payroll, University resources, ethics and compliance, IT security, campus safety and parking.
- ☐ Schedule weekly or monthly meeting to touch base with supervisor.
- ☐ Facilitate enrollment in the University Business Processes Workshop(s) related to job: http://www.northwestern.edu/hr/workplace-learning/business-processes/index.html

Within First Month

- ☐ Remind employee to enroll for benefits online within 31 days of hire date.
- ☐ Schedule a meeting to review and clarify performance objectives and expectations after the first month. Review this checklist together.

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- ☐ **Both manager and employee then sign and submit this form to Administrative Services.**

Continuing Onboarding

First 90 Days

- ☐ Approve employee enrollment in New Employee Orientation Part 2 when prompted via email (generated when employee initiates enrollment). A chartstring is necessary as there is a $50 cancellation fee.
- ☐ Review and discuss the staff member's performance objectives.

First Six Months

- ☐ Review performance objectives and progress.
- ☐ Discuss training completed and training planned for the future.

Annual Performance Review

- ☐ Conduct annual performance review.
- ☐ Set objectives for the coming year with employee.

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