



# Manager/Supervisor Checklist for Onboarding New Employees

New Employee Name: \_\_\_\_\_

BEFORE THE FIRST DAY	
<input type="checkbox"/> Offer position	<input type="checkbox"/> After consultation with HR, call employee to offer position <input type="checkbox"/> Confirm position information: <ul style="list-style-type: none"> <li><input type="checkbox"/> Employment Status/Position</li> <li><input type="checkbox"/> Salary</li> <li><input type="checkbox"/> Start date, time, and location</li> <li><input type="checkbox"/> Work schedule</li> <li><input type="checkbox"/> Appointments necessary prior to employment (drug screen, fingerprint, etc.)</li> </ul> <input type="checkbox"/> Inform HR of position acceptance so offer letter can be generated <input type="checkbox"/> Close out hiring requisition (disposition applicants/change statuses to non-selection reason codes.)
<input type="checkbox"/> Prepare for employee's first day/week	<p>Set up appointments with critical people for the employee's first few weeks and add to new employee's calendar:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> HR/Benefits orientation (normally on 1<sup>st</sup> day or during first week)</li> <li><input type="checkbox"/> ITS orientation (normally on the 1<sup>st</sup> or 2<sup>nd</sup> day). Contact the Help Desk to schedule.</li> <li><input type="checkbox"/> Subject Matter Experts/Leads/Department reps for job specific training (HRIS, Learning Management System, job specific software, etc.)</li> </ul> <p>Prepare a Training Plan for the new employee</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Identify what job specific training is needed and provide schedule and timeline</li> <li><input type="checkbox"/> Coordinate with trainers (as appropriate)</li> <li><input type="checkbox"/> Provide links to relevant websites</li> <li><input type="checkbox"/> Provide reference material such as guides/handbooks and/or other resources material</li> </ul> <p>Other Areas for Consideration</p>
<input type="checkbox"/> Organize and Prepare the Workspace, Equipment, and Tools	<p>Organize and Prepare the Workspace</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare workspace, provide basic office/desk supplies</li> <li><input type="checkbox"/> Order name plate/tag and/or business cards (if appropriate)</li> <li><input type="checkbox"/> Send an email to Safety &amp; Security to order physical keys to cabinets, office, and/or building</li> <li><input type="checkbox"/> Verify working phone and/or computer</li> <li><input type="checkbox"/> Identify and verify availability of any other equipment or accommodations needed</li> </ul> <p>Arrange for the set-up, install, configuration and/or clearing of:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Phone/extension/voicemail (as appropriate)</li> <li><input type="checkbox"/> Computer</li> <li><input type="checkbox"/> Printers</li> <li><input type="checkbox"/> Scanners/copiers</li> <li><input type="checkbox"/> Network access and permissions for the necessary drives</li> <li><input type="checkbox"/> Other equipment</li> </ul> <p>Ensure the employee has the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> User ID, logon and default password</li> <li><input type="checkbox"/> Active Directory access</li> <li><input type="checkbox"/> Email</li> <li><input type="checkbox"/> Systems and applications necessary to perform work</li> <li><input type="checkbox"/> Extension number and default password</li> <li><input type="checkbox"/> Other: _____</li> </ul>

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<input type="checkbox"/> Put together Welcome Packet	<p>Put together a list of materials to assist the employee in understanding his/her role and the organization which may include:</p> <ul style="list-style-type: none"> <li>• Welcome letter from you</li> <li>• Schedule for first week and onboarding schedule</li> <li>• Job description (includes personnel designation for emergency situations)</li> <li>• Employee/position expectations (if appropriate)</li> <li>• Performance goals</li> <li>• Links to job manuals, HR policies, faculty handbook (if available)</li> <li>• Contact names, numbers and emails for office, department and/or key staff</li> <li>• Process for sick and vacation leave time requests</li> <li>• Process for completing timesheet (for non-exempt employees)</li> <li>• Department/office organization chart</li> <li>• Parking and transportation information</li> <li>• Mission, vision, values and performance measures for the unit, division, department and college/campus</li> <li>• Applicable websites, resources and user guides, and common reference materials</li> <li>• Safety/emergency procedures</li> <li>• Map of campus with building highlighted (if applicable)</li> <li>• List of campus/college holidays and pay schedule</li> <li>• ITS New Employee Orientation Packet (available via the portal on the ITS department site). Includes information systems and telephone procedures.</li> </ul>
<input type="checkbox"/> Notify others of the new hire	<p>Contact departmental faculty and staff:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Notify them of a new hire</li> <li><input type="checkbox"/> Determine what information, if any, is needed</li> </ul> <p>Announce the new hire to colleagues:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Send via email to department and impacted parties or partners. Include employee name, position, start date, what their job/role and responsibilities will be, and a brief employee bio</li> <li><input type="checkbox"/> Copy the new employee, if appropriate</li> </ul>
<input type="checkbox"/> Connect with new employee before first day	<ul style="list-style-type: none"> <li><input type="checkbox"/> Verify offer letter and job description were received</li> <li><input type="checkbox"/> Inform employee to bring           <ul style="list-style-type: none"> <li>• <a href="#">I-9</a> Identification for employment eligibility verification</li> <li>• Direct deposit information</li> </ul> </li> <li><input type="checkbox"/> Confirm first day details, such as:           <ul style="list-style-type: none"> <li>• Employment status/position</li> <li>• Salary</li> <li>• Start date, time, and location</li> <li>• To whom he/she should report on first day</li> <li>• Work schedule</li> <li>• Appointments necessary prior to employment (drug screen, fingerprint, etc.)</li> <li>• Appropriate dress/uniform</li> <li>• Parking and/or transportation options</li> <li>• Confirm pre-employment requirements (background check, fingerprints, drug screen, etc.) are completed</li> </ul> </li> </ul>
Additional:	
<input type="checkbox"/>	
<input type="checkbox"/>	

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FIRST DAY	
<input type="checkbox"/> Welcome new employee upon arrival, provide tour and overview of the first day/week	<input type="checkbox"/> Welcome the new employee upon arrival <i>Provide a tour and introduce the new employee to:</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Department and team members</li> <li><input type="checkbox"/> Key personnel, such as mailroom staff, payroll staff, safety &amp; security staff, etc.</li> <li><input type="checkbox"/> Work area</li> <li><input type="checkbox"/> Emergency exits, fire extinguishers, elevators, stairs, exits, restrooms, kitchen area (if available), break room (if available), cafeteria, copy, office supply, and mail areas (if applicable)</li> <li><input type="checkbox"/> Building access, permitted and restricted areas, as well as public and staff areas, and where to use keys</li> </ul> <i>Provide an overview of the first day/week:</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review and explain calendared appointments and training assignments</li> <li><input type="checkbox"/> Share immediate and short term tasks/goals</li> </ul> <i>Share information and resources:</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide Welcome Packet (if applicable) and review content</li> <li><input type="checkbox"/> Provide link to new employee website</li> <li><input type="checkbox"/> Visit Safety &amp; Security to pick up key(s), ID, or other items to gain access to office</li> <li><input type="checkbox"/> Rules regarding food</li> <li><input type="checkbox"/> Expectations for work week/hours of work/lunch schedule/overtime/flextime, if applicable</li> </ul>
<input type="checkbox"/> Review operations, organizational structure, organizational and team goals	<input type="checkbox"/> Provide list of current department projects and cyclical programs, highlighting roles of other department members <input type="checkbox"/> Review the organizational charts for the institution(s), department/office, other <input type="checkbox"/> Review organizational and division/office goals <input type="checkbox"/> Discuss and coach the creation of performance and development goals
<input type="checkbox"/> Share Resources and Information required for Work	Provide an overview of programs, operations, systems: <ul style="list-style-type: none"> <li><input type="checkbox"/> Share users guides/handbooks/manuals</li> <li><input type="checkbox"/> Enlist assistance of others (if applicable)</li> <li><input type="checkbox"/> Assign classroom or online training (if applicable)</li> </ul>
<input type="checkbox"/> Schedule Regular One-on-One Meetings, starting with day one	Check in with employee at the end of the first day: <ul style="list-style-type: none"> <li><input type="checkbox"/> Inquire how the first day went</li> <li><input type="checkbox"/> Encourage employee to ask questions</li> <li><input type="checkbox"/> Make time to listen and address questions</li> </ul>
FIRST WEEK	
<input type="checkbox"/> Review first week schedule	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review scheduled appointments and training</li> <li><input type="checkbox"/> Discuss timing and due dates</li> <li><input type="checkbox"/> Provide resources, information, demonstration on who and how to access job specific training and information</li> <li><input type="checkbox"/> Check in with the employee at the end of each day</li> <li><input type="checkbox"/> Introduce employee to mentor (faculty) / sponsor (staff, if applicable)</li> <li><input type="checkbox"/> Show them how to order office/desk supplies</li> </ul>
<input type="checkbox"/> Follow up on HR/ benefits Onboarding Tasks	Ensure employee has begun to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Review and update personal information</li> <li><input type="checkbox"/> Review and elect benefits</li> <li><input type="checkbox"/> Read, review and acknowledge institution and HR policies</li> </ul>



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FIRST MONTH	
<input type="checkbox"/> Complete Onboarding Tasks	<input type="checkbox"/> Confirm he/she has reviewed institution-wide and HR policies, answer any questions <input type="checkbox"/> Before the end of 30 calendar days, ensure he/she has elected benefit coverage options <input type="checkbox"/> Confirm he/she has completed essential training including online sexual harassment training
<input type="checkbox"/> Hold regular 1:1 meetings	Calendar regular one-on-one meetings with the employee to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Answer their questions and help foster engagement</li> <li><input type="checkbox"/> Discuss progress, performance and acknowledge contributions and successes</li> <li><input type="checkbox"/> Provide resources for areas presenting challenges (if applicable)</li> </ul>
<input type="checkbox"/> Discuss Performance Management Process/Goals	<ul style="list-style-type: none"> <li><input type="checkbox"/> Explain Performance Management Process</li> <li><input type="checkbox"/> Establish initial performance and professional development goals (for staff, document on Performance Planning &amp; Appraisal form)</li> </ul>
<input type="checkbox"/> Check in on Onboarding Experience	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure initial onboarding tasks are completed/ underway</li> <li><input type="checkbox"/> Ask about what is going well and what else might be needed</li> <li><input type="checkbox"/> Inquire about the sponsor (if applicable)/mentor arrangement</li> </ul>
THIRD MONTH	
<input type="checkbox"/> Conduct performance check in	<input type="checkbox"/> Discuss with the employee his/her performance to date
FIRST SIX (6) MONTHS / YEAR	
<input type="checkbox"/> Conduct Performance Check in / End of Probation Evaluation	<input type="checkbox"/> Discuss with the employee his/her performance to date For CWA staff, conduct 180-day probationary evaluation: <ul style="list-style-type: none"> <li><input type="checkbox"/> Celebrate the end of the probationary period</li> <li><input type="checkbox"/> Complete formal evaluation (follow university process)</li> <li><input type="checkbox"/> Discuss performance and/or development goals</li> <li><input type="checkbox"/> Draft new goals (if appropriate)</li> </ul>
<input type="checkbox"/> Conduct annual evaluation/Set Performance & Development Goals	<ul style="list-style-type: none"> <li><input type="checkbox"/> Complete formal evaluation (follow university/college process)</li> <li><input type="checkbox"/> Set performance and development goals for the upcoming evaluation period</li> <li><input type="checkbox"/> Define what successful performance looks like</li> </ul>
<input type="checkbox"/> Check in on Onboarding Experience	<ul style="list-style-type: none"> <li><input type="checkbox"/> Inquire about onboarding experience</li> <li><input type="checkbox"/> Ask for feedback on areas to improve/develop and what went well</li> </ul>
Additional:	