ONBOARDING CHECKLIST FOR SUPERVISOR

This checklist was created for the Office of Business and Finance and is for your reference. Not all activities will be relevant for each employee.

BEFORE THEIR FIRST DAY
- o Send an informational letter outlining the specifics of the employee's position, including department organization chart to show reporting relationship, salary, etc.
- o Review email from HR, including Supervisor's Checklist for the New Employee
- o Be familiar with what paperwork a new hire needs to complete
- o Confirm date and time of HR New Employee Orientation session
- o Confirm employee was able to access their email account
- o Before the start date, send your new employee an email that includes the following:
    - o Date and time to arrive on the first day
    - o What to bring on the first day
    - o Where to report and whom to ask for upon arrival
    - o Transportation and/or parking information
    - o Dress policy
    - o Options for lunch
- o Send an announcement to your department about the new team member and a brief overview of their work experience – encourage staff to send welcome emails
- o Prepare work space for employee
    - o Have office space cleaned, if needed
    - o Set up the phone(s): Determine if your new employee will need a new phone, or have an existing one reconfigured
    - o Ensure office supplies are available (pens, paper, post-its, message pads, etc.)
    - o Include a welcome sign on the door or computer, if possible
- o Add employee to appropriate email lists and calendar systems
- o Coordinate with Office of Business and Finance Information Technology (OBFIT) or Facilities Management Information Technology (FMIT) for computer and other technology needs
- o Work with building coordinator to provide building access
- o Prepare job duties/expectations document *(Onboarding Plan Template)*
- o Select one of your staff members to be a new hire ambassador for your new hire's first few months
- o Set up meetings (one-on-one/small group) with individuals that your new employee should meet – team members can describe their work and how it integrates with the work of the new team member
- o Schedule one-on-one meetings with your new employee to discuss the job description, performance expectations, appropriate attire, time and leave, etc.
- o Create a first-week schedule for new employees (meetings with others, downtime to review orientation materials, tour of building, etc.)

FIRST DAY

- o Department tour – workspace, break room, supply space, bathrooms, etc.
- o Introduce new employee to colleagues
- o Discuss emergency building plans
- o Discuss time reporting procedures (time sheet, sick or vacation leave, etc.)
- o Review department policies and any compliance forms (office hours, dress code, etc.)
- o Issue keys, if applicable
- o Discuss probationary period
- o Approve system access requests
- o If employee is assigned a vehicle, discuss necessary training and responsibilities
- o Schedule designated time for the new employee to review, complete and sign necessary paperwork, if needed (I-9 Form, benefit enrollment, etc.)
- o Introduce them to their onboarding ambassador

FIRST WEEK

- o Discuss department mission, goals, and values
- o Review job duties/expectations document *(Onboarding Plan Template)*
- o Discuss assessment criteria and timeline for performance evaluation
- o Discuss workplace trainings and how those will be administered (online/in person)
- o Discuss relevant recurring meetings
- o Review customer service expectations
- o Assist with questions regarding employee handbook and onboarding webpage
- o Distribute/review department and University contact lists and organizational charts
- o Add the new employee to your website directory page
- o Order name tag and business cards, if applicable

ONE MONTH

- o Continue to review job duties/expectations document *(Onboarding Plan Template)*
- o Plan *performance management* timeline moving forward

TWO MONTHS

- o Complete *two-month evaluation* for staff compensation system (SCS) employees
- o Continue to review job duties/expectations document *(Onboarding Plan Template)*

THREE MONTHS

- o Continue to review job duties/expectations document *(Onboarding Plan Template)*

FOUR MONTHS

- o Complete *four-month evaluation* for SCS employees

SIX MONTHS

- o Complete *six-month review* for SCS employees