

Employee Onboarding Checklist for Managers

This onboarding checklist is intended to serve as a helpful guide—rather than an exhaustive “to-do” list—for you to use as you prepare and engage your new hire for their role.

Employee Name	Start Date
Job Title	

BEFORE EMPLOYEE STARTS

- Notify Human Resources that a candidate has been selected after a verbal offer has been given and accepted by candidate.
 - Offer is contingent upon a clear background check.
- Deny all other unselected candidates in Workday.
- Provide necessary information to HR in order to create the offer letter. Offer letter will then be sent after the candidate's background check has been cleared.
- Determine space and technology needs
 - Contact OIT to obtain computer and/or laptop and necessary equipment.
 - Fill out any necessary forms for employee access (PeopleSoft, Canvas, Terminated Account Access, etc.)
- Create new employee's first week's schedule
 - Assign team members to meet with employee to discuss different topics specific to department and role.
 - Include key meetings, lunches with staff members, training sessions, etc.

PRIOR TO DAY ONE

- Contact New Hire & Welcome them to the University
 - Where to go on day one & what time to arrive
 - Assistance with commuting/parking
- Ensure the workspace is clean and if necessary, stock their desk/office with supplies
- Verify access needs for space/buildings. Contact Facilities for any keys needed.

EMPLOYEES FIRST DAY

- Greet & welcome new employee
 - Escort employee to the Human Resources office.
 - Visit to complete the I-9 verification process
 - Attend new hire orientation for new employee
 - Officially introduce the employee to other team members
 - Discuss departments practices and procedures
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- Standard work hours/schedule
 - Standing meetings
 - Vacation/sick policy
 - Time Tracking requests & approvals processes
 - University calendars & holidays
 - Supply requests
 - Evacuation procedures & emergency action plan

FIRST WEEK

- Review in detail duties, responsibilities, competencies, expectations and explain how the employee's role fits within the department
- Explain Workday and where to find certain information on pay, time off, etc.
- Ensure new hire completes all of the assigned training in Vector.
 - Notify HR if FERPA training is required for the employee.
- Ensure new hire receives staff ID card from Connections once they receive their ID info from Human Resources.

TWO WEEKS

- Schedule and conduct regularly occurring one-on-one meetings
 - Continue to provide timely, on-going, meaningful "everyday" feedback
- Ensure employee has successfully submitted benefit/retirement elections and direct deposit if necessary.
- Encourage employee to attend New Employee Benefits Orientation (info included in offer letter)

THREE MONTHS

- Conduct 3 month probationary review prior to the expiration of probationary period

- If there are any concerns regarding a new employee's performance, please reach out to HR to investigate strategies to help new employee be successful
- Review issues or challenges and identify ways to resolve
- Celebrate successes and recognition of employee's contributions
- Discuss and provide professional development opportunities
- Continue to touch base, review performance standards, expectations, project updates and answer any questions