

Manager's Onboarding Toolkit

Pre-arrival Checklist for New Employees

Employee Name: _____ DOH: _____ Hiring Manager: _____

Position: _____ Department: _____

- ☐ Call the new employee to welcome them to your department. Provide them with the information on when and where to report on their first day as well as to whom. Also, provide them with the information on where to park.
- ☐ Send informal announcement to your department to introduce the new hire.
- ☐ Send HR the Employment Notice Form to initiate entry into HR/Payroll Systems and to initiate IT systems access

Work Environment

Obtain Keys/codes for:

- ___ Building/office
- ___ Desk/File Cabinets/storage
- ___ Office equipment codes (copier)

Procedure Manuals:

- ___ Department Procedure Manual (if applicable)

Prepare desk space with Office Supplies:

- ___ Order Business Cards (if applicable)
- ___ Stapler/Remover
- ___ Paperclips/pens/pencils
- ___ Post-it Notes
- ___ Academic Year Calendar
- ___ Calculator
- ___ Tape/Ruler
- ___ Note Pads

Calendar Management

- ___ Place regularly scheduled 1-1 meetings for you and your employee on their calendar.
- ___ Place System Trainings (Banner, etc.) on employee calendar for the first few weeks.
- ___ Place routine Department Staff Meetings on their calendar.
- ___ Place New Employee Orientation Date on their calendar. (Assigned by HR for the first Thursday of every month).
- ___ Schedule introductory meetings with department members and key colleagues on their calendar during their first two weeks of employment.

Technology

- ___ Telephone extensions are clearly marked; Voicemail directions provided for new hire to set up phone.
- ___ Print out instructions for Voicemail set-up and message retrieval.
- ___ Provide IT Department with details regarding necessary access to Curry Reports/Professional Websites needed for job responsibilities.

Key Metrics: As the Hiring Manager, you will need to prepare the performance goals for the new hire in the position that would need to be achieved within 90 days, 180 days and a year from date of hire. You will receive an email from Human Resources with the applicable form and additional information to assist you with this process. Please send the performance goal document to Human Resources for the employee's personnel file within the first 30 days of employment. Please schedule these 3 dates on your calendar before the employee starts to meet this deliverable. Please send the signed evaluations to the Office of Human Resources once completed.

Performance Goals	/ /	90-Days Evaluation Date:	/ /
180-Days Evaluation Date:	/ /	1 year Evaluation Date:	/ /

First Week Checklist with New Employees

- ☐ Be early to greet your new hire, welcome them to their first day, and show them to their desk.
- ☐ Bring them around the department and introduce the new hire to the staff and Senior Staff Member.
- ☐ Show them around the Office and identify the break room and/or restroom locations; emergency exits.
- ☐ Schedule yourself or a designee to bring the new employee to lunch and demonstrate how the Student Center Café works (the green take out box, the stations, how to put Colonel Cash on their employee card).
- ☐ Ensure employee has completed all HR Paperwork, and if not please bring them to the Office of Human Resources to complete any paperwork necessary. **The Form I-9 needs to be completed within 3 business days of their start date.**
- ☐ Check in with the new hire at the end of each day the first week to see how things are going and if they need anything.

Day 1: Review

- ___ Job Description and functions for their role.
- ___ Organizational Chart for the Department and the Division.
- ___ Provide them with a general training plan.
- ___ Provide them with their voicemail and email login and passwords for the computer system(s).
- ___ Ensure the passwords/logins work properly. Trouble shoot if needed.

Departments Policies and Procedures for:

- | | |
|---|---|
| ___ Standard Office Hours and work schedule | ___ Attendance Policy |
| ___ Dress Code | ___ Lunch Schedule and coverage |
| ___ Personal Calls | ___ Departmental Mail Processes |
| ___ Vacation/Personal Day Policy | ___ Email Policy |
| ___ Time Sheets/ADP Process | ___ Weather Emergency Policy/Notification process |
| ___ Expense Reports/Purchase requests | ___ Emergency Evacuation Procedures |
| ___ Telephone Etiquette for Department | ___ How to obtain outside line for phone/Fax (7+1+ #) |
| ___ Parking Areas they can/cannot use | ___ Confidentiality of information/FERPA laws |

Week 1: Hiring Manager or Assigned Department Colleague to cover the following:

- ___ Demonstrate how to transfer calls/conduct a conference call, retrieve voice mail, forward calls.
- ___ Demonstrate how to use the Curry Portal to find and retrieve information.
- ___ Bring the new hire to the Public Safety Office to get a parking sticker and ID Badge. (They will need their driver's license and the car registration).
- ___ Bring the new hire on a campus tour to show them the main offices and colleagues in other departments.
- ___ Meet with your employee at the end of their first week to check in on how they are feeling about their first week and to identify any concerns regarding equipment, supplies or challenges they may be encountering.

Required Trainings

Please ensure that your employee has completed or has scheduled time on their calendar to complete the following required online training modules *within their first 30 days*:

- ___ Unlawful Harassment Prevention Training (United Educators)*
- ___ Diversity: Inclusion in the Modern Workplace (Everfi)**
- ___ Checkpoint Data: Security & Privacy online trainings (Everfi)**

*Employee will need to register for training themselves. The link is located in their new hire paperwork.

**Employee will receive an email during their first week with a link to the training.

Important Timelines for Managers with New Hire

FIRST MONTH CHECKLIST

- ___ Create 90, 180 and 1-year performance goals for the employee, communicate these performance goals and any necessary training that will occur to get them to these goals. Return this document to Human Resources for the employee's personnel file.
- ___ Ensure New Hire has completed the required online trainings and notified HR.
- ___ Ensure New Hire has attended/is scheduled to attend New Employee Orientation.
- ___ Ensure Mandatory trainings for their role have been completed or are scheduled to occur.
- ___ Communicate to the employee that there will be a 90-Day Review where you will discuss successes and challenges to achieving the goals and identify resolutions to challenges to ensure their success. Encourage them to discuss these during the 1-1 meetings with you to keep progress on track. Inform the employee that there will also be a 180-Day Review and a 1-Year Review.

THREE-MONTH CHECKLIST

- ___ Conduct a 90-Day Performance Appraisal with employee, providing detailed feedback on their achievements, identifying any development areas and support measures to assist employee with attaining the goals within the established timeframes.
- ___ Send the signed 90-Day Performance Appraisal to the Office of Human Resources.
- ___ Facilitate any additional trainings necessary for the employee to support success.
- ___ Schedule 180-Day Performance Evaluation and continue to discuss the goals for employee.
- ___ Encourage them to discuss these during the 1-1 meetings with you to keep progress on track.

SIX-MONTH CHECKLIST

- ___ Conduct 180-Day Performance Appraisal with employee, providing detailed feedback on their achievements, identifying any development areas and support measures to assist employee with attaining the goals within the established timeframes.
- ___ Send the signed 180- Day Performance Appraisal to the Office of Human Resources.
- ___ Facilitate any additional trainings necessary for the employee to support success.
- ___ Schedule 1-year Performance Appraisal and continue to encourage them to discuss these during the 1-1 meetings with you to keep progress on track.

ONE-YEAR CHECKLIST

- ___ Conduct the 1-year Performance Appraisal with the employee, providing detailed feedback on their achievements, identifying any development areas and support measures to assist employee with attaining the goals within the established timeframes.
- ___ Send the signed 1-year Performance Appraisal to the Office of Human Resources.
- ___ Facilitate any additional trainings necessary for the employee to support success.