

## Supervisor/Mentor Checklist for New Employee Onboarding

**Purpose:** This checklist will guide the Supervisor in effectively bringing a new employee on-board at the University. It can be used to integrate an existing employee who transfers into the work group as well. This checklist will walk you through the steps to successfully orient your new employee. *It is meant to guide, rather than restrict.* Not all items may be applicable to your area or to a transferred employee.

**Note:** As a Supervisor, you may choose to assign some tasks to a Mentor – *a co-worker with a good performance standing and a positive point of view.* However, **where the Mentor’s column is shaded, we highly recommend the supervisor maintain responsibility for the completion of these tasks.**

**Instructions:** Review the relevant items and plan time for the items on your schedule. Record the completion date for each item. **When finished, place a copy in the employee’s folder and mail a copy to HR-Staffing at the end of the probationary period.**

<b>Employee Name:</b>	<b>Title:</b>	<b>Hire Date:</b>
<b>Department:</b>	<b>Supervisor:</b>	<b>Mentor:</b>

Pre-Arrival	Date Completed	
	Supervisor	Mentor
<ul style="list-style-type: none"> <li>• Call or email the new employee a few days before arrival to welcome and to briefly inform of arrival time, location, first day agenda, parking, dress code, etc. <b>If new employees: Remind to bring two forms of ID on the first day and to bring their license plate number.</b></li> </ul>		
<ul style="list-style-type: none"> <li>• Prepare the new employee’s workstation (supplies, phone, computer &amp; printer connectivity, paper, pen and writing pad items).</li> </ul>		
<ul style="list-style-type: none"> <li>• Inform the staff of the new team member; explain the position role, and the relationship to existing members (leader/peer, peer to peer, intern, etc.).</li> </ul>		
<ul style="list-style-type: none"> <li>• Appoint an experienced, star employee to act as a Mentor and discuss the purpose of the role.</li> </ul>		
<ul style="list-style-type: none"> <li>• Review the position Competency Profile and prepare a Work Plan form.</li> </ul>		
<ul style="list-style-type: none"> <li>• Develop an <b>Employee Development Plan (EDP)</b>. Contact HR for training and guidance in developing a training plan.</li> </ul>		
<ul style="list-style-type: none"> <li>• Identify training resources, ITS, HR and Banner personnel to discuss training registration and training timeframes.</li> </ul>		
<ul style="list-style-type: none"> <li>• Create a <b>Week One Orientation Agenda</b> for the new employee and provide a copy to the Mentor.</li> </ul>		
<ul style="list-style-type: none"> <li>• Plan small work task for employee to perform on the first day.</li> </ul>		
<ul style="list-style-type: none"> <li>• Arrange breakfast or lunch with new employee on the first day.</li> </ul>		
First Day Arrival and First Week	Date Completed	

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	Supervisor	Mentor
• Welcome the employee (if possible, make the welcome eventful).		
• Take to breakfast or make plans for lunch.		
• Introduce to team members (or direct reports and management team).		
• Introduce to the Mentor.		
• Bring new employee over to HR (King – RM 222) to complete required paperwork.		
• Walk new employee to the ID Office to ensure photo ID is obtained.		
• Take on tour of these University campus locations <ul style="list-style-type: none"> <li>○ Credit Union location</li> <li>○ ATM Machines</li> <li>○ Faculty and Staff dining facility and other lunch options</li> <li>○ Library</li> <li>○ Post Office</li> <li>○ Interoffice Mail Drop</li> <li>○ Book Store</li> <li>○ Parking Services</li> </ul>		
• Inform of the free campus shuttle service		
• Take building tour (work facilities/ washrooms, break room, copier, HR).		
• Help new employee get registered for necessary training.		
• Clarify unofficial office do's and don'ts		
• Share any other necessary and advantageous information.		
• Provide a Student\Faculty\ Staff Directory.		
• Explain importance of ID badge.		
• Provide guidance and instructions for accessing email off campus.		
• Share information about the academic environment.		
<b>First Day Arrival and First Week</b>		
• Explain operation of office equipment: <b>Phone</b> -voicemail and standard message, and provide phone directory. <b>Computer:</b> user name and password, email account & signature, and internet usage. <b>Other equipment:</b> copier, fax		
• Explain communication channels (bulletin boards, websites, Campus News and department website).		
• Provide door keys, policy and explain office security.		
• Discuss appropriate office dress, work clothes/uniform, etc.		
• Explain the University's mission/vision and goals.		
• Explain the Department's mission/vision and goals and provide the department organizational chart.		
<b>First Day Arrival and First Week</b>	<b>Date Completed</b>	

## Supervisor/Mentor Checklist for New Employee Onboarding

	Supervisor	Mentor
<ul style="list-style-type: none"> <li>• Discuss how new employee's role contributes to the overall success to the University and Department.</li> </ul>		
<ul style="list-style-type: none"> <li>• Review the job description.</li> </ul>		
<ul style="list-style-type: none"> <li>• Review work plan form and probationary period               <ul style="list-style-type: none"> <li>○ Discuss critical functions and expected performance standards and outcomes.</li> <li>○ Clarify expected work habits and ethics (see Behavioral Competencies).</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Review applicable State, University and Department policies and procedures and encourage reviewing of the online SPA or EPA Handbook.</li> </ul>		
<ul style="list-style-type: none"> <li>• Discuss time and attendance reporting:               <ul style="list-style-type: none"> <li>○ Weekly timesheet</li> <li>○ Application for Leave (vacation, sick, etc.).</li> <li>○ Inform if position is Exempt or Subject to FLSA</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Discuss workplace safety and emergencies.</li> </ul>		
<ul style="list-style-type: none"> <li>• Ensure that new employee finishes the HR 49er Connect Online New Employee Orientation Modules – Parts 1 thru 6.</li> </ul>		
<ul style="list-style-type: none"> <li>• Explain university and department specific acronyms.</li> </ul>		
<ul style="list-style-type: none"> <li>• Ensure new employee completes paperwork for direct deposit.</li> </ul>		
<b>First Month</b>		
<ul style="list-style-type: none"> <li>• Schedule monthly coaching sessions during the six month probation.</li> </ul>		
<ul style="list-style-type: none"> <li>• Devote time to listen to comments, concerns and observations. And provide clarity to employee's questions.</li> </ul>		
<ul style="list-style-type: none"> <li>• Follow-up after new employee attends HR Orientation.</li> </ul>		
<ul style="list-style-type: none"> <li>• Discuss working agreements, leadership style &amp; communication preferences.</li> </ul>		
<ul style="list-style-type: none"> <li>• Discuss and complete Environmental Health and Safety required information.</li> </ul>		
<ul style="list-style-type: none"> <li>• Discuss protocol for handling issues/concerns.</li> </ul>		
<b>Two to Six Months</b>		
<ul style="list-style-type: none"> <li>• Continue to coach for success.</li> </ul>		
<ul style="list-style-type: none"> <li>• Review and modify EDP as needed.</li> </ul>		
<ul style="list-style-type: none"> <li>• Determine probationary status and discuss with employee.</li> </ul>		
<ul style="list-style-type: none"> <li>• Complete the Functional Competency Assessment and return to HR.</li> </ul>		
<ul style="list-style-type: none"> <li>• Complete and return probationary documentation received from HR.</li> </ul>		
<ul style="list-style-type: none"> <li>• Mail a copy of this checklist to HR-Staffing at the end of the probationary period.</li> </ul>		