

HELLO

my name is

Manager's Onboarding Checklist

Manager's Onboarding Checklist

Before the Start Date

Work Schedule and Job Duties

Assigned to:

- ☐ Call your new employee and confirm:
 - ☐ Start date
 - ☐ Work place
 - ☐ Start time
 - ☐ First day contact person
- ☐ Provide Transportation and Parking information
- ☐ Review dress expectations and department culture
- ☐ Email follow-up with link to New Employee Onboarding webpage
- ☐ Inform the employee about the New Employee Briefing program
- ☐ Discuss relocation support provided by the department
- ☐ Discuss the need for new employee [payroll advance](#)

Create action plan/tasks for the employee's first day

Assigned to:

- ☐ Put together a welcome packet from the department and include:
 - ☐ Job description
 - ☐ New Employee Checklist "Getting Started"
 - ☐ Leave accrual and reporting guidelines, department procedures for requesting sick/vacation time
 - ☐ Job manual or employee handbook (if available)
 - ☐ Schedule for the first week
 - ☐ Department/unit organization chart
 - ☐ Contact information for co-workers in the department
 - ☐ Map of campus with building(s) highlighted
 - ☐ Mission/Vision and guiding principles for PSU and department/unit and how this employee's work supports our mission
 - ☐ Information on pay statements and direct deposit
 - ☐ Trial Service/Probation information (if appropriate)
 - ☐ New Employee Briefing invitation
 - ☐ Confidentiality Information
 - ☐ HIPPA and FERPA information (if appropriate)
 - ☐ OIT Acceptable Use Policy

Manager's Onboarding Checklist

Making Connections

Assigned to:

- ☐ Notify colleagues in your department of the new hire (include start date, what their job will be and employee bio)
- ☐ Identify a coworker to be a resource for the new employee
- ☐ Arrange a campus tour sometime in the first week or two
- ☐ Set up meetings with critical people for the employee's first weeks

Human Resources

Assigned to:

- ☐ Contact your HR Partner
- ☐ Confirm with HR that they have received all recruitment paperwork for the new employee
 - ☐ Make sure you have submitted the Letter of Offer
 - ☐ Confirm background check

Work Space

Assigned to:

- ☐ Order basic office furniture and supplies (desk, chair, bookshelf etc.)
- ☐ Order computer if needed and have all relevant software installed
- ☐ Schedule phone installation and assign a phone number
- ☐ Clean the work area
- ☐ Order business cards, name tag, and name plate
- ☐ Verify that the employee's workspace is prepared

Technology and Access

Assigned to:

- ☐ Prepare a key order form for the employee's signature /order card access
- ☐ If temporary computer access is needed prior to the start date, request a sponsored ODIN account in advance for the employee
- ☐ Consider software needs of the job such as:
 - ☐ Daily software needs
 - ☐ Printer connections
 - ☐ Departmental portal and network access
- ☐ Submit P-card and travel card requests (if necessary)

Training /Development

Assigned to:

- ☐ Arrange pertinent trainings required for the job (examples include): Banner, Drupal, etc.
- ☐ Enroll the employee in the New Employee Briefing program through HR

Manager's Onboarding Checklist

First Day

Department Onboarding

Assigned to:

- ☐ Welcome them upon arrival – Understand that they may be nervous; try not to overwhelm them
- ☐ Show them to their workspace
- ☐ Arrange to have lunch with the new employee on their first day
- ☐ Give them the department welcome packet
- ☐ Review welcome packet and take time to discuss contents (see “Before Start Date” checklist for contents)
- ☐ Review work expectations, and process for reporting sick leave, sick child, and vacation time/requests
- ☐ Review policies regarding breaks and meal periods
- ☐ Provide overview of the schedule for the first day and work week
- ☐ Review Onboarding timeline (this document) with the employee
- ☐ Review Trial Service period (if applicable)
- ☐ Introduce them to department and team members
- ☐ Introduce them to a member of their department who can act as a resource
- ☐ Show them where to find: restrooms, elevators, stairs, exits, kitchen area, lockers/closets, etc.
- ☐ Confirm that they receive building access cards/keys
- ☐ Review FERPA and HIPPA guidelines (if applicable)
- ☐ Show them where to find recycling, compost, and garbage bins

Human Resources Onboarding

Assigned to:

- ☐ Take the new employee to HR to complete their new employee paperwork
- ☐ Assist the employee in signing up for these services:
 - ☐ Odin Account Manager:
 - ☐ PSU Alert Screen
 - ☐ Directory
 - ☐ Banner
 - ☐ DataMaster
 - ☐ PeopleAdmin
- ☐ Review HR Portal
- ☐ Have them sign up for the New Employee Briefing, if not done so already
- ☐ Have the employee sign the Position Description and Letter of Offer, if not done so already

Manager's Onboarding Checklist

Introduce them to work area

Assigned to:

- ☐ Overview of software and other technology, confirm they have set up email signature
- ☐ Review Phone policy and long distance cards, order a card if necessary
- ☐ Review the Computer Acceptable Use Policy
- ☐ Introduce them to the office computer network (shared files and/ or drives)
- ☐ Show them how to use the copier and other relevant office equipment
- ☐ Assist the employee in accessing the appropriate systems: Banner, dataMaster, etc.
- ☐ Assist them when entering their information into the online directory
- ☐ Confirm PSU signature block in email

Additional Tasks

Assigned to:

- ☐ _____
- ☐ _____
- ☐ _____

First Week

Check-in

Assigned to:

- ☐ Inquire how first week went and make time to listen to any questions
- ☐ Review training schedule
- ☐ Verify that computer, network systems, printer, email, telephone, voicemail. etc. are working and ensure that duplex printing is set as default
- ☐ Explain your work style and discuss how it will fit with the style of the new employee
- ☐ Provide list of current department projects and cyclical programs
- ☐ Discuss PSU's Vision, Mission and Values, as well as the Five Guiding Themes
- ☐ Review key PSU policies:
 - ☐ Code of Ethics, Policy, Ethics Guide for Public Employees
 - ☐ Consensual Relationship Policy
 - ☐ Drug Free Policy
 - ☐ Professional Standards of Conduct Policy
 - ☐ Prohibited Discrimination & Harassment (including Sexual Harassment) Policy

Manager's Onboarding Checklist

Additional Tasks

Assigned to:

- ☐ _____
- ☐ _____
- ☐ _____

First Month

Check-in

Assigned to:

- ☐ Establish weekly or bi-weekly meetings with new employee
- ☐ Answer their questions and help foster engagement with organization Check in about benefits
- ☐ and pay statement to see if they have any questions Review job description and see if there are
- ☐ any questions
- ☐ Discuss process for performance reviews; set short-term and long-term goals Review
- ☐ performance standards
- ☐ Check in with department resource for their perspective
- ☐ Remind the employee to complete the online training session "Creating a Culture of Respect" at <http://www.pdx.edu/diversity/learning-module> (required for all PSU employees)

Additional Tasks

Assigned to:

- ☐ _____
- ☐ _____
- ☐ _____

First Three Months

Check-in

Assigned to:

- ☐ Performance appraisal – 3 month progress report
- ☐ Check in with employee to let them know how they are doing
- ☐ Review performance goals (both short and long term)
- ☐ Answer their questions and help foster engagement with organization

Additional Tasks

Assigned to:

- ☐ _____
- ☐ _____
- ☐ _____

Manager's Onboarding Checklist

First Six Months

Check-in

Assigned to:

- ☐ (Classified) Trial service performance review
- ☐ (Unclassified) Progress appraisal
- ☐ Determine performance goal
- ☐ Answer their questions and help foster engagement with organization

Additional Tasks

Assigned to:

- ☐ _____
- ☐ _____
- ☐ _____

After Trial Service Period

Check-in

Assigned to:

- ☐ Celebrate the end of the trial service status
- ☐ Schedule annual performance review
- ☐ Answer their questions and help foster engagement with organization

Additional Tasks

Assigned to:

- ☐ _____
- ☐ _____
- ☐ _____