

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:

- ☐ _____
- ☐ _____
- ☐ _____