

## Onboarding Checklist for Managers – First 90 Days

*Please note: The information in this document is for PeopleAdmin users and designed to match the flow of the onboarding tasks in the new Talent Acquisition System, PageUp.*

Congratulations on your new hire!

New hires are a tremendous asset to the Northeastern community and long-term retention of any new hire starts before their first day of work. Your attention to detail during your new hires' first months will help ensure they have a great experience and will enable them to become successful contributors to the university quickly.

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. The new hire will also have access to the [New Hire Website](#) which has a wealth of online onboarding resources. This checklist is divided into the below timeframes:

1. Prior to the New Hire's Start Date
2. The New Hire's First Week: Day One, Week One
3. Month One
4. Months Two and Three

The HRM team is also here to help you with the onboarding process. Reach out to your HR Business Partner, your department's key contact and/ or your department's administrative assistant for help in managing a successful first 90 days and beyond.

SECTION 1: PRIOR TO DAY ONE	
Welcome your New Hire to the University	<p>Contact your new hire and welcome them to the university.</p> <p>If appropriate at this time, confirm start details such as:</p> <ul style="list-style-type: none"> <li>- Where to go on day one</li> <li>- What time to arrive</li> <li>- What meetings are planned for day one</li> <li>- Assistance with commuting/parking</li> <li>- Dress code, if necessary</li> </ul>
Determine Space and Technology Needs	<p>You will want your new hire to be ready to hit the ground running on day one, so it's important to have their space ready for them:</p> <ul style="list-style-type: none"> <li>- Determine where your new hire will sit</li> <li>- Identify needed technology (phone, computers etc.), equipment and furniture</li> <li>- Visit the appropriate ITS Getting Started site based on the type of hire: <ul style="list-style-type: none"> <li><a href="#">Staff</a></li> <li><a href="#">Temp Non-Student/Sponsored Accounts</a></li> <li><a href="#">Faculty</a></li> </ul> </li> <li>- Refer to the list available on the <a href="#">Onboarding Resources and Training website</a> for additional information and links</li> <li>- Work with your local points of contact for space, moves, refurbishment and purchasing, as needed</li> <li>- Visit the <a href="#">Facilities Work Order website</a> to arrange for vacuuming, painting, keys, etc.</li> </ul> <p>If your new hire works remotely, work with them to ensure their space, equipment and technology needs are met.</p>
Prepare a New Hire Onboarding Plan	<p>It is a good idea to develop an onboarding plan in advance of your new hire's first day. Consider the following when creating the plan:</p> <ul style="list-style-type: none"> <li>- Outline their initial calendar of events</li> <li>- Set up a few initial meetings and, if possible at this time, add the new hire to any standing meetings</li> <li>- Determine first projects/tasks/events</li> <li>- Assign a peer/buddy/mentor, if necessary</li> <li>- Plan a tour, if necessary</li> </ul>
Announce Your New Hire in Advance	<p>If appropriate, send an introduction note to the new hire's team/college/division in advance. It's a great way to make the new hire feel welcome.</p>

Systems Access and Initial Training	<p>Set up initial training before your new hire arrives:</p> <ul style="list-style-type: none"> <li>- If your new hire is working in the greater Boston area, register them for the <a href="#">university wide orientation</a> at the Boston Campus.</li> <li>- For remote and global hires, work with the department or campus to provide a local orientation.</li> <li>- Arrange for systems access and any initial training (e.g. Banner Finance, Concur, etc.). Contact the responsible department for access forms and training availability.</li> <li>- Procure access for things like signature authority, permissions, delegations, etc.</li> </ul>
Prepare Work Space and Secure Building Access	<p>New hires want to feel welcome on day one:</p> <ul style="list-style-type: none"> <li>- Ensure that their space is cleaned and, if necessary, stock their desk/office with supplies</li> <li>- Verify any access needs for space/building such as keys, codes, etc.</li> <li>- Determine uniform requirements, if necessary</li> </ul>
Environmental Health & Safety Training	<p>Determine if any Environmental Health &amp; Safety Training (EHS) is needed. For more information or to set up appropriate training, visit the <a href="#">EHS training website</a>.</p>
Arrange Lunch and/or Welcome Activity	<p>Set up lunch plans for your new hire's first day with their team or department. If appropriate, plan a welcome coffee/social meet and greet for your new hire in their first week.</p>

## SECTION 2: DAY ONE AND WEEK ONE

Day 1: Welcome the New Hire on Day One	<p>Welcome your new hire on day one - either in person, via phone call or by email.</p> <p>Provide an overview of the first week:</p> <ul style="list-style-type: none"><li>- Cover first week highlights</li><li>- Set expectations</li><li>- Don't overwhelm them with too much information</li></ul>
Review the New Hire Onboarding Plan	<p>Meet with your new hire during their first few days to explain the purpose of their onboarding plan and review the plan with them. Make sure not to overwhelm your new hire with too much information at a time.</p>
Introduce the New Hire to the Team/ Department	<p>Introduce the New Hire to their Team/Department:</p> <ul style="list-style-type: none"><li>- Send an email to the new hire's department if you haven't yet</li><li>- Walk them around to meet the team/department/tour the building</li><li>- Review the organizational chart</li><li>- Show them the restrooms, kitchen/break room, supply closets, etc.</li></ul>
Introduce Necessary Systems and Provide Access	<p>Introduce your new hire to necessary systems and provide access:</p> <ul style="list-style-type: none"><li>- Help your new hire <a href="#">create their myNortheastern account</a></li><li>- Remind them that this login cascades to many other systems on campus</li><li>- Review the <a href="#">Onboarding Resources and Training website</a> for guidance on systems/resources your new hire might need to access</li><li>- Have them <a href="#">enroll them in multi-factor authentication through DUO</a></li><li>- Provide them with keys/codes, if necessary</li><li>- Review available software (Outlook, Skype, etc.)</li><li>- Explain your department's shared drives/technology protocols</li></ul>
Review Department Practices	<p>Review any department specific standards, practices and procedures. These may include:</p> <ul style="list-style-type: none"><li>- Standard work hours/schedules</li><li>- Standing meetings</li><li>- Vacation/sick policy/process</li><li>- Time Tracking requests/approvals/processes</li><li>- Overtime hours, if applicable</li><li>- University calendars &amp; holidays</li><li>- Office open/close procedures</li><li>- Evacuation procedures/emergency contact plan</li></ul>

SECTION 3: MONTH ONE	
Discuss Expectations for Your New Hire	<p>It is important to learn about your new hire's working style and share your own to build an effective working relationship. This starts by doing the following:</p> <ul style="list-style-type: none"> <li>- Outline role expectations for the first month through 90 days (including the probationary period)</li> <li>- Review their job description</li> <li>- Set check in schedule</li> <li>- Explain initial meetings/people to meet</li> <li>- Assign first projects/tasks/events</li> <li>- Start to draft initial goals with your new hire for the first 90 days</li> <li>- Be available to answer questions</li> </ul>
Confirm Completion of Employee Self-Service	Ensure that your new hire has reviewed/updated their personal information in Employee Self-Service.
Continue to Get to Know Northeastern	<p>Continue to show your new hire around campus:</p> <ul style="list-style-type: none"> <li>- Take them on a walk/tour of the campus and suggest a <a href="#">visitor center tour</a> if they are on the Boston campus.</li> <li>- Outline any major department or campus events that will take place during their first few weeks. View the <a href="#">Northeastern Calendar</a>.</li> <li>- Encourage them to participate in activities such as <a href="#">Open Classroom</a>, Convocation, the President's State of the University Address, <a href="#">First Thursday</a>, a <a href="#">sporting event</a>, etc.</li> <li>- Review nearby amenities (post offices, restaurants, cafes, etc.)</li> </ul>
Ensure Your New Hire is Set Up for Success	<p>It's important to continue to meet regularly with your new hire throughout their first month:</p> <ul style="list-style-type: none"> <li>- Make sure to check on their benefits, first pay period, commute, schedule, etc.</li> <li>- If appropriate, ensure they are meeting with their peer/buddy</li> <li>- Provide list of department goals, projects, cyclical programs, events</li> <li>- Continue to build your relationship</li> </ul>
Discuss Performance Management	<p>Discuss the Performance Management process, including the schedule for mid-year and year end reviews.</p> <p>Be sure to:</p> <ul style="list-style-type: none"> <li>- Discuss your approach to feedback - both to and from the new hire and your team</li> <li>- Review performance standards and expectations for the role</li> <li>- Finalize goals for probationary period and start to talk about annual goals</li> <li>- More information on the performance management process, including training, can be found <a href="#">here</a></li> </ul>
Check In with Peer/Buddy	Touch base with peer/buddy and make sure they have had a chance to connect with your new hire. You may want to ask your new hire how it's going as well.

Section 4: Months Two and Three	
Increase University Awareness	<p>Build cross functional opportunities for your new hire to learn about the wider university by connecting them with areas outside of their own:</p> <ul style="list-style-type: none"> <li>- Introduce your new hire to other university partners</li> <li>- Encourage them to attend university events (Convocation, a sporting event, a local Alumni Event, or RISE)</li> </ul>
Check in on Performance	<p>At this point, your new hire should be in a routine and producing work results. Review the performance process again and ask your new hire for their initial thoughts on how they are doing.</p> <ul style="list-style-type: none"> <li>- Review performance</li> <li>- Have a probationary period check in</li> <li>- Finalize annual goals</li> <li>- If there are any initial concerns about performance, contact your HR Business Partner to discuss them</li> </ul>
Plan Professional Development Opportunities	<p>Northeastern is a life-long learning opportunity. Now is a good time to identify ways for your new hire to stay engaged and grow at Northeastern:</p> <ul style="list-style-type: none"> <li>- <a href="#">Review the SAIL Framework</a></li> <li>- Review the foundational and job specific skills and competencies needed for success</li> <li>- Review internal and external opportunities</li> <li>- Many opportunities can be found on the <a href="#">Learning &amp; Organizational Development</a> website</li> </ul>
Draft Probationary Period Review	<p>The probationary period review should be completed and discussed with your new hire. A copy of the signed review should be retained by the manager. Access the template for this review <a href="#">here</a>.</p> <p>Feedback from this review and these goals should be incorporated into the annual review and review process. The annual review should be completed and turned in at the end of the cycle. A college or division contact will collect the reviews which then make their way to Human Resources Management for the personnel file.</p>