Departmental Onboarding Checklist

for SHRA and EHRA Non-Faculty New Hires

To ensure we acclimate our new employees in a strategic, thoughtful, thorough, and excellent manner, we have created this checklist as a resource for supervisors. Listed below are some items to take care of PRIOR to a new employee's arrival. The second page includes information to review once the employee begins. Aggies Do!

GETTING STARTED

☐ Put together welcome packet from the department and include: welcome memo, contact names and phone lists, and department specific information that might be helpful to the new employee.

☐ Clean the work area, and set up cube/office space with supplies.

☐ Order office or work area keys.

☐ Order business cards and name plate.

☐ Arrange for parking, if needed.

☐ Add employee to relevant email lists.

☐ Email department/team/functional area of the new hire. Include start date, employee's role, and bio. Copy the new employee, if appropriate.

☐ Arrange for a campus tour.

TECHNOLOGY ACCESS/RELATED

☐ Order technology equipment as needed (computer, monitor, etc.) and software.

☐ Contact IT department to have the system set up in advance of employee's arrival.

☐ Arrange for phone installation.

SUPPLIES NEEDED ON START DATE

☐ Ensure new hire has basic supplies ready on the first day: notebooks, pens/pencils, markers, small and large paper clips, stapler, tape, calculator, scissors, desk organizer, hanging file folders, manila folders, rubber bands, drawer organizer, post-it notes, etc.

☐ Order business cards in advance of start date

CALENDAR

☐ Think about the employee's first few weeks, and any important meetings they might need to attend. Reach out to the meeting organizers to inform them of new hire's attendance.

JOB SHADOW SET-UP

☐ Select appropriate personnel with whom the new employee should shadow. Arrange for a meeting during their first week.

☐ Review expectations with selected personnel in advance – determine/discuss essential items that need to be covered

OTHER

☐ Add other information here:

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INTRODUCTIONS AND TOURS

☐ Give introductions to department staff and key personnel during tour.

☐ Tour of facility, including:

- Restrooms
- Mail rooms
- Copy centers
- Fax machines
- Bulletin board
- Parking
- Printers
- Office supplies
- Breakroom
- Coffee/vending machines
- Emergency exits and supplies
- Files

COMPUTERS

☐ Hardware and software reviews, including:

- Email
- Intranet
- Technical support
- Microsoft Office
- Data on shared drives
- IT security
- Databases
- Internet
- Dept. website

DEPARTMENTAL POLICIES

☐ Review key policies.

- Requesting sick time
- Requesting vacation
- Time and leave reporting
- Emergency procedures/fire exits
- Confidentiality
- Dress code
- Security
- Safety plan/worker's comp
- Visitors
- E-mail and Internet acceptable use

ADMINISTRATIVE PROCEDURES

☐ Review general administrative procedures.

- Office/desk/work station
- Keys
- Mail (incoming and outgoing)
- Shipping (FedEx, DHL, and UPS)
- Business cards
- Inclement weather policy
- Telephones
- Purchase requests
- Conference rooms
- Picture ID badges
- Ordering office supplies
- Complete Property Clearance Form with employee

POSITION INFORMATION

☐ Review initial job assignments and training plans.
☐ Review job description and performance evaluation template and standards.
☐ Review professional growth goals, short and long term.
☐ Review job schedule and hours.
☐ Review information about job shadowing: select colleagues with whom to shadow, and review expectations
☐ Review payroll timing/calendar, leave reports, how to access pay stubs, and related policies and procedures.