

Manager/Supervisor Checklist for Onboarding New Employees

New Employee Name: _____

BEFORE THE FIRST DAY	
<input type="checkbox"/> Offer position	<input type="checkbox"/> After consultation with HR, call employee to offer position <input type="checkbox"/> Confirm position information: <ul style="list-style-type: none"> <input type="checkbox"/> Employment Status/Position <input type="checkbox"/> Salary <input type="checkbox"/> Start date, time, and location <input type="checkbox"/> Work schedule <input type="checkbox"/> Appointments necessary prior to employment (drug screen, fingerprint, etc.) <input type="checkbox"/> Inform HR of position acceptance so offer letter can be generated <input type="checkbox"/> Close out hiring requisition (disposition applicants/change statuses to non-selection reason codes.)
Digital Identity Creation for New Employee	<input type="checkbox"/> For COTC employees , HR sends an offer letter with links for the new employee to complete paperwork. After receiving the Personal Data Record (PDR) form, HR/Fiscal will create a record in IDM (guest account) that will generate an email from "OSU IT" entitled "OSU Sponsored Guest Request" to the new employee asking them to go to my.osu.edu to create a name.#. This email is sent on behalf of Ohio State University to their personal email and is time sensitive, and the link will expire after two weeks. Not completing this task can delay the roll-on process. <input type="checkbox"/> For OSU employees , this process is conducted through Workday. This email is sent on behalf of Ohio State University to their personal email and is time sensitive, and the link will expire after two weeks. Not completing this task can delay the roll-on process. <input type="checkbox"/> New Employee will have access to organizational email once the name.# has been created. <input type="checkbox"/> After the name.# is created, the hiring manager submits the MITSPAR for additional IT requests.
Submit MITSPAR Form	<p>The MITSPAR form will ask for hiring manager to fill out information for the new employee's computer equipment, network access and permissions for the drives, systems, and applications necessary to perform work, access to common area phones and organizational account emails as well as any other IT related needs.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Go to the website https://go.osu.edu/IT <input type="checkbox"/> Sign-in to your account <input type="checkbox"/> Select Order Services <input type="checkbox"/> Select Onboarding Services <input type="checkbox"/> Click on Newark Campus MITSPAR <p>Once the MITSPAR requests are complete, the New Employee will receive a welcome letter from the IT Service Desk with Onboarding information.</p> <p>Step by Step Instructions can be found at. KB08749</p>

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<input type="checkbox"/> Prepare for employee's first day/week	<p>Set up appointments with critical people for the employee's first few weeks and add to new employee's calendar:</p> <ul style="list-style-type: none"> <input type="checkbox"/> HR/Benefits orientation (normally on 1st day or during first week) <input type="checkbox"/> Subject Matter Experts/Leads/Department reps for job specific training (HRIS, Learning Management System, job specific software, etc.) <input type="checkbox"/> Pick up Buck ID <p>Prepare a Training Plan for the new employee</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identify what job specific training is needed and provide schedule and timeline <input type="checkbox"/> Coordinate with trainers (as appropriate) <input type="checkbox"/> Provide links to relevant websites <input type="checkbox"/> Provide reference material such as guides/handbooks and/or other resources material <p>Other Areas for Consideration</p>
<input type="checkbox"/> Organize and Prepare the Workspace, Equipment, and Tools	<p>Organize and Prepare the Workspace</p> <ul style="list-style-type: none"> <input type="checkbox"/> Prepare workspace, provide basic office/desk supplies <input type="checkbox"/> Order name plate/tag and/or business cards (if appropriate) <input type="checkbox"/> Send an email to Safety & Security to order physical keys to cabinets, office, and/or building <input type="checkbox"/> Identify and verify availability of any other equipment or accommodations needed <input type="checkbox"/> Confirm with New Employee they have required access to email, phones, applications, and any other relevant IT needs. <input type="checkbox"/> Other: _____

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<input type="checkbox"/> Put together Welcome Packet	<p>Put together a list of materials to assist the employee in understanding their role and the organization which may include:</p> <ul style="list-style-type: none"> • Welcome letter from you • Schedule for first week and onboarding schedule • Job description (includes personnel designation for emergency situations) • Employee/position expectations (if appropriate) • Performance goals • Links to job manuals, HR policies, faculty handbook (if available) • Contact names, numbers and emails for office, department and/or key staff • Process for sick and vacation leave time requests • Process for completing timesheet (for non-exempt employees) • Department/office organization chart • Parking and transportation information • Mission, vision, values and performance measures for the unit, division, department and college/campus • Applicable websites, resources and user guides, and common reference materials • Safety/emergency procedures • Map of campus with building highlighted (if applicable) • List of campus/college holidays and pay schedule
<input type="checkbox"/> Notify others of the new hire	<p>Contact departmental faculty and staff:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Notify them of a new hire <input type="checkbox"/> Determine what information, if any, is needed <p>Announce the new hire to colleagues:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Send via email to department and impacted parties or partners. Include employee name, position, start date, what their job/role and responsibilities will be, and a brief employee bio <input type="checkbox"/> Copy the new employee, if appropriate
<input type="checkbox"/> Connect with new employee before first day	<ul style="list-style-type: none"> <input type="checkbox"/> Verify offer letter and job description were received <input type="checkbox"/> Inform employee to bring <ul style="list-style-type: none"> • I-9 Identification for employment eligibility verification • Direct deposit information <input type="checkbox"/> Confirm first day details, such as: <ul style="list-style-type: none"> • Employment status/position • Salary • Start date, time, and location • To whom they should report on first day • Work schedule • Appointments necessary prior to employment (drug screen, fingerprint, etc.) • Appropriate dress/uniform • Parking and/or transportation options • Confirm pre-employment requirements (background check, fingerprints, drug screen, etc.) are completed
Additional:	
<input type="checkbox"/>	
<input type="checkbox"/>	

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FIRST DAY	
<input type="checkbox"/> Welcome new employee upon arrival, provide tour and overview of the first day/week	<input type="checkbox"/> Welcome the new employee upon arrival <i>Provide a tour and introduce the new employee to:</i> <ul style="list-style-type: none"> <input type="checkbox"/> Department and team members <input type="checkbox"/> Key personnel, such as mailroom staff, payroll staff, safety & security staff, etc. <input type="checkbox"/> Work area <input type="checkbox"/> Emergency exits, fire extinguishers, elevators, stairs, exits, restrooms, kitchen area (if available), break room (if available), cafeteria, copy, office supply, and mail areas (if applicable) <input type="checkbox"/> Building access, permitted and restricted areas, as well as public and staff areas, and where to use keys <i>Provide an overview of the first day/week:</i> <ul style="list-style-type: none"> <input type="checkbox"/> Review and explain calendared appointments and training assignments <input type="checkbox"/> Share immediate and short term tasks/goals <i>Share information and resources:</i> <ul style="list-style-type: none"> <input type="checkbox"/> Provide Welcome Packet (if applicable) and review content <input type="checkbox"/> Provide link to new employee website <input type="checkbox"/> Visit Safety & Security to pick up key(s), ID, or other items to gain access to office <input type="checkbox"/> Rules regarding food <input type="checkbox"/> Expectations for work week/hours of work/lunch schedule/overtime/flextime, if applicable
<input type="checkbox"/> Review operations, organizational structure, organizational and team goals	<input type="checkbox"/> Provide list of current department projects and cyclical programs, highlighting roles of other department members <input type="checkbox"/> Review the organizational charts for the institution(s), department/office, other <input type="checkbox"/> Review organizational and division/office goals <input type="checkbox"/> Discuss and coach the creation of performance and development goals
<input type="checkbox"/> Share Resources and Information required for Work	Provide an overview of programs, operations, systems: <ul style="list-style-type: none"> <input type="checkbox"/> Share users guides/handbooks/manuals <input type="checkbox"/> Enlist assistance of others (if applicable) <input type="checkbox"/> Assign classroom or online training (if applicable)
<input type="checkbox"/> Schedule Regular One-on-One Meetings, starting with day one	Check in with employee at the end of the first day: <ul style="list-style-type: none"> <input type="checkbox"/> Inquire how the first day went <input type="checkbox"/> Encourage employee to ask questions <input type="checkbox"/> Make time to listen and address questions
FIRST WEEK	
<input type="checkbox"/> Review first week schedule	<ul style="list-style-type: none"> <input type="checkbox"/> Review scheduled appointments and training <input type="checkbox"/> Discuss timing and due dates <input type="checkbox"/> Provide resources, information, demonstration on who and how to access job specific training and information <input type="checkbox"/> Check in with the employee at the end of each day <input type="checkbox"/> Introduce employee to mentor (faculty) / sponsor (staff, if applicable) <input type="checkbox"/> Show them how to order office/desk supplies
<input type="checkbox"/> Follow up on HR/ benefits Onboarding Tasks	Ensure employee has begun to: <ul style="list-style-type: none"> <input type="checkbox"/> Review and update personal information <input type="checkbox"/> Review and elect benefits <input type="checkbox"/> Read, review and acknowledge institution and HR policies

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FIRST MONTH	
<input type="checkbox"/> Complete Onboarding Tasks	<input type="checkbox"/> Confirm they has reviewed institution-wide and HR policies, answer any questions <input type="checkbox"/> Before the end of 30 calendar days, ensure they has elected benefit coverage options <input type="checkbox"/> Confirm they has completed essential training including online sexual harassment training
<input type="checkbox"/> Hold regular 1:1 meetings	Calendar regular one-on-one meetings with the employee to: <ul style="list-style-type: none"> <input type="checkbox"/> Answer their questions and help foster engagement <input type="checkbox"/> Discuss progress, performance and acknowledge contributions and successes <input type="checkbox"/> Provide resources for areas presenting challenges (if applicable)
<input type="checkbox"/> Discuss Performance Management Process/Goals	<ul style="list-style-type: none"> <input type="checkbox"/> Explain Performance Management Process <input type="checkbox"/> Establish initial performance and professional development goals (for staff, document on Performance Planning & Appraisal form)
<input type="checkbox"/> Check in on Onboarding Experience	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure initial onboarding tasks are completed/ underway <input type="checkbox"/> Ask about what is going well and what else might be needed <input type="checkbox"/> Inquire about the sponsor (if applicable)/mentor arrangement
THIRD MONTH	
<input type="checkbox"/> Conduct performance check in	<input type="checkbox"/> Discuss with the employee their performance to date
FIRST SIX (6) MONTHS / YEAR	
<input type="checkbox"/> Conduct Performance Check in / End of Probation Evaluation	<input type="checkbox"/> Discuss with the employee their performance to date For CWA staff, conduct 180-day probationary evaluation: <ul style="list-style-type: none"> <input type="checkbox"/> Celebrate the end of the probationary period <input type="checkbox"/> Complete formal evaluation (follow university process) <input type="checkbox"/> Discuss performance and/or development goals <input type="checkbox"/> Draft new goals (if appropriate)
<input type="checkbox"/> Conduct annual evaluation/Set Performance & Development Goals	<ul style="list-style-type: none"> <input type="checkbox"/> Complete formal evaluation (follow university/college process) <input type="checkbox"/> Set performance and development goals for the upcoming evaluation period <input type="checkbox"/> Define what successful performance looks like
<input type="checkbox"/> Check in on Onboarding Experience	<ul style="list-style-type: none"> <input type="checkbox"/> Inquire about onboarding experience <input type="checkbox"/> Ask for feedback on areas to improve/develop and what went well
Additional:	