

## New Hire/Onboarding Checklist

### Prepare for the New Employee's Arrival

- Call or email new hire to answer any immediate questions and to welcome them! Clarify date, time, location of first day and when and where to report. Employment Services or International Services can assist.
- Collect information to give to the new employee upon arrival-such as the complete job description (not the job posting), an organization chart of the lab and department, a phone listing/directory for the department, printouts or URLs of specific policies that pertain to their new role and responsibilities.
- Send an email announcement to the department announcing the new employee's arrival.
- Gather any documents and review with the new hire the department's current goals, strategic plan, priorities and initiatives.
- Plan any welcome activities. Consider assigning a buddy to help the new employee.
- Prepare a schedule for the new employee's first week. Please make sure that your new hire is signed up for New Employee Orientation as it's a requirement for all new staff to attend.
- Ensure the workspace is clean and has needed equipment and supplies. Arrange for identity markers such as a name plate. If the new hire requested work place accommodations, work with HR to make arrangements in advance.

## The First Days

- Clear your schedule to be available to the employee on his or her first day. Plan to begin and end the day with him or her.
- Arrange for introductions of others in the department.
- New hire will also meet with Employment Services or International Services to review and complete new hire paperwork.
- Communicate basic information about the workplace. If you identified that you wish to assign a buddy, facilitate introductions now. Explain policies and procedures for work hours, breaks, overtime, use of vacation, sick time, paid time off and holidays.
- Take new hire to receive security badge, computer account and to register vehicle with security if applicable.
- Review the job description with the employee, describing how the new employee's job fits in the department and how the job and department contribute to the lab.
- Discuss how you and the employee will communicate, including each person's communication style preferences for giving and receiving information and feedback.
- Clarify the first week's schedule and confirm required and recommended training.
- Touch base quickly each day communicates you support their efforts.
- Plan the employee's first lunch, including who will participate.
- Discuss training needs.
- If the hire is in a supervisory and above position, HR Records needs a list of direct reports to transfer to the new hire. The new manager will not be able to approve timesheets until this happens.

## The First Weeks

- Continue to debrief with new hire. If challenges have emerged, thoroughly discuss and plan how to address those challenges.
- Establish goals and provide regular, informal feedback during this initial time.

- Explain how the employee's performance will be formally evaluated.
- Provide additional contextual information about the department to increase understanding of the purpose, value added, goals and initiatives.

### **Within the First Six Months**

- Ensure needed training is completed.
- Continue providing regular informal feedback by having frequent discussions about his/her assignments, productivity and comfort level.
- As defined by the Administrative Guide Memo 22.14, at the end of the trial period, have a formal feedback discussion to assess performance and jointly develop goals for the next review period.
- Direct the employee to key policy documents that he/she needs to be aware of either as a new employee or for his/her work. Refer to the Administrative Guide and SLAC Policy Repository.
- Provide information about continued learning opportunities, support services and events and activities that may relate to the employee's interests. Staff should also be aware of STAP funds and other employee assistance programs.

### **Between Six and Twelve Months**

- Celebrate successes with recognition of his/her contributions.

You may wish to clarify these aspects of working together:

-Is the job what you expected? How or how not?

-Are you having enough opportunities to learn and grow? What are some you would like?

-Are you running into any hindrances to your productivity? What are they and how do they affect you?

-Offer professional development opportunities, such as cross training, identifying a mentor or coach, leading a project or committee, etc.

- Continue providing regular informal feedback, and provide formal feedback at the one year service anniversary (this is in addition to the formal feedback at the end of the trial period).
- If a buddy was arranged, meet with the buddy and new employee to check in on how things went: get feedback on any aspect of the buddy relationship they would change.
- Discuss the onboarding process for the last time, asking for specific feedback about what was highly useful or helpful that occurred, and what would have been helpful to the new employee that he/she recommends be included in future onboarding processes. As appropriate, document the feedback and send to your local Human Resources representative.

