# New Employee Department Onboarding Checklist

| Before Employee's First Day | |
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| **Completed** | **Task** |
| | Send welcome email to new employee letting them know where to report after they have completed required orientations. Including start/end time, office location, closest parking lot, dress code, etc. |
| | Set up employee's work area including computer, phone, essential supplies, etc. |
| | Set up employee's training scheduling (example training schedule can be found in the Manager Toolkit on the HR website) |

| DAYS 1-10 | |
| --- | --- |
| **Completed** | **Task** |
| | Introduce new employee to the team<br>• Provide Department directory with phone/email |
| | Tour the office layout, employees work area and other key areas such as bathrooms, break room, printers and the supplies closet |
| | Meeting with Supervisor<br>• Discuss Job Description and expectations<br>• Explain your role as a supervisor<br>• Probationary period (if applicable)<br>• Go over the training schedule and the skills, software and processes employee will learn<br>• Review key policies and university schedules (pay/holiday/timecard deadline)<br>• Show them the time keeping system they use including requesting time off process and how to enter vacation, sick leave, etc |
| | Set up all technology, systems, and applications needed to perform their duties (this list is not all inclusive and some may not apply to all employees).<br>• Phone and voicemail setup<br>• HR Applicant Tracking System<br>• Banner<br>• Web Report Library<br>• Z:Drive<br>• Argos<br>• Teams/Webex<br>• Athena<br>• Star |

| | Epic |
|---|---|
| | • API |
| | • Department/job specific systems |
| | Schedule meet and greets with cross departments that work closely together |

## DAYS 11-30

| Completed | Task |
|---|---|
| | Supervisor check-in meeting<br>• Gauge how employee feels about new position<br>• Discuss how successful they feel about their trainings and determine what additional trainings they need<br>• Address employees' questions and concerns |
| | Benefits Deadline<br>• Remind employee to sign up for benefits, if eligible, within their first 30 days |
| | University on-line trainings<br>• Ohio Ethics (including conflict of interest - all employees)<br>• Title IX - VAWA (including supervisor anti-harassment - all employees)<br>• IT Security and Privacy (includes FERPA - all employees)<br>• ADA (supervisors only)<br>• HIPAA Basics (employees working in the healthcare "hybrid entity" only)<br>• Medicare Fraud, Waste, and Abuse (healthcare "hybrid entity" only) |

## DAYS 31-60

| Completed | Task |
|---|---|
| | Review some of the employee's completed work and determine if meeting expectations and if additional training is needed |
| | Check-in Meeting with Supervisor<br>• Give feedback on the completed work you reviewed, highlighting the areas they are excelling at as well as areas they can improve<br>• Question and concerns of employee<br>• Gather feedback on the onboarding process |

| DAY 60 | |
|---|---|
| **Completed** | **Task** |
| | Meeting with Supervisor<br>• Show employee performance review and discuss how they will be evaluated in the future and inform them of the date of their actual performance review<br>• Schedule meeting for mid-probationary evaluation<br>    ○ 60 days for those with 120 day probationary period<br>    ○ 90 days for those with 180 day probationary period<br>• Schedule meeting for end of probation evaluation |
| | Benefits Deadline<br>• Remind full-time employee they have 120 days to change to Alternative Retirement Plan and would need to set up appointment with approved vendors. |