

Onboarding Checklist for Managers

Preboarding

Ensure their workstation is set up/Equipment ordered or set up for remote employees.

Provide access to collaboration tools (SharePoint, Teams, Folders, Drives, shared email, etc.).

Order/Obtain building security tools (e.g., ID card, key, entry card, code, FOB, etc.)

Send a welcome announcement in the group/unit and invite team/unit members to join you in welcoming them.

Make arrangements for a Welcome breakfast, lunch, or virtual team meeting.

Set up one-on-one conversations with team members and key colleagues throughout their first few weeks.

Identify “Onboarding Buddy”

Day One

Plan to be in and meet with your new employee on their first day

Did they complete their I-9 Verification Session Meeting that MUST be completed by their 3rd day of work?

Use the [Talent Management – Manager Dashboard in Workday](#) to monitor and ensure completion of all electronic [onboarding tasks](#) as well as their assigned required compliance training.

One-on-one conversations with team members and key colleagues commence and continue for the next few weeks (Plan meetings and add to a “week one agenda” to share with them on their 1st day).

Conduct Welcome festivities (ex: breakfast, lunch, or virtual meeting)

Introduce new employee to their Onboarding Buddy

Buddy should show them around – giving them a tour of the building (where applicable) and show them how to enter time (non-exempt) and time off (non-exempt and exempt).

Encourage/arrange the attendance of unit/college/campus level orientation (where applicable).

Ensure they have visited their parking chair/facilities representative to obtain their permanent parking pass.

Arrange for and begin job-specific training.

Be sure to check in at the end of their first day to see how it went.

Week One

Job-specific training continues.

Continued introduction to workmates and key colleagues continues.

Buddy meetings should continue.

Check in at the end of week one by conducting an Entrance Interview (see details under 'Additional Manager Resources' on the [New Employee Onboarding Information for Managers webpage](#).)

- This is also a great time to follow up again on onboarding task completion (e.g. – I-9, Required Electronic tasks in Workday, Benefit election -- where applicable).
- Share unit/department-specific documents such as organization chart, dress code, etc.)
- Set Performance Expectations: You and your employee receive a notification to “Set Content” in Workday when hired. This is the first step in the Staff Performance Review process. Take time to set their initial performance goals and discuss general expectations.

Week Two

Job-specific training continues.

Buddy meetings end (but can be/are encouraged to continue for several weeks).

Check in at the end of week two and review your department's specific vision, goals, and priorities and review functions of other units you work closely with.

Week Three

Job-specific training continues.

Conduct a check-in/touch-base to ensure that time-sensitive onboarding tasks are under way or completed:

- Ensure they've completed all required compliance training assigned to their transcript in the Learning Resource Network (LRN).
- Confirm that they've selected their benefits (must be selected within 31 days of their start date (if applicable)

Month One

Continue job-specific training.

Conduct a one-month check-in and continue weekly meetings.

- Create a development plan with them.
- Reconfirm that compliance training and benefits have been completed/elected.

Months 3, 6, and 9

Conduct a retention interview in month three (see details under 'Additional Manager Resources' on the [New Employee Onboarding Information for Managers webpage](#).)

Continue to meet with your new employee weekly for a brief one-on-one meeting.

Consider assigning a mentor and promoting monthly meetings.

Conduct performance feedback check-ins (at least at the 6-month marker but we suggest that performance check-ins happen more often during regularly scheduled manager check-ins)

One Year

Celebrate their first year and the end of the probationary period.

Conduct a one-year retention interview (do not combine this meeting with their performance review)

Conduct a performance review (there should be no surprises).

Update/course correct development plan if needs be.