



Employee Onboarding Checklist for Managers

This onboarding checklist is intended to serve as a helpful guide—rather than an exhaustive “to-do” list—for you to use as you prepare and engage your new hire for their role.

TWO WEEKS BEFORE EMPLOYEE STARTS

- Notify team the position has been filled and the new employee’s tentative start date
- Determine space and technology needs
 - Contact Telecommunications indicating whether you need a phone line added, moved, or changed
 - Contact OIT to obtain computer and/or laptop and necessary equipment
- Order office supplies (notebooks, pens, mouse pad, etc.)
- Create new employee’s first week’s schedule
 - Assign team members to meet with employee to discuss different topics specific to department and role
 - Include key meetings, lunches with staff members, training sessions, etc.

PRIOR TO DAY ONE

- Contact New Hire & Welcome them to the University
 - Where to go on day one & what time to arrive
 - Assistance with commuting/parking
- Ensure the workspace is clean and if necessary, stock their desk/office with supplies
- Verify access needs for space/buildings
- Email the team an informal announcement about the new employee along with a short bio

EMPLOYEES FIRST DAY

- Greet & welcome new employee
- Conduct tours of floor, building, other appropriate facilities, etc.
- Escort employee to Page-Robinson Hall
 - Visit the HR Service Center to complete the I-9 verification process
 - Head upstairs to visit the Card Office to obtain a Brown ID card and the Transportation Office to sign-up for parking
- Officially introduce the employee to other team members
- Set up email account access
- Discuss departments practices and procedures
 - Standard work hours/schedule
 - Standing meetings
 - Vacation/sick policy

- Time Tracking requests & approvals processes
- University calendars & holidays
- Evacuation procedures & emergency action plan
- Supply requests

FIRST WEEK

- If appropriate, plan a welcome coffee/social meet and greet for your new hire in their first week.
- Review in detail duties, responsibilities, competencies, expectations and explain how the employee's role fits within the department
- Set up one on one meetings with other team members or small groups
 - Provide a list of key constituents for the new employee to meet outside of the department. Assist in making initial introductions if appropriate.
- Go over necessary systems/software and provide access (Zoom, Banner, Shared Drives, etc.)
- Arrange for employee to take campus tour

ONE MONTH

- Schedule and conduct regularly occurring one-on-one meetings
 - Continue to provide timely, on-going, meaningful "everyday" feedback
- Ensure employee has successfully submitted benefit/retirement elections
- Assign first project/task and draft initial goals
- Encourage employee to attend New Employee Orientation program
- Review the onboarding process with the employee - is it working well? What is missing?

THREE MONTHS

- Conduct 3 month probationary review prior to the expiration of probationary period
 - If there are any concerns regarding a new employee's performance, please reach out to UHR to investigate strategies to help new employee be successful
- Review issues or challenges and identify ways to resolve
- Celebrate successes and recognition of employee's contributions
- Discuss and provide professional development opportunities
- Continue to touch base, review performance standards, expectations, project updates and answer any questions