BROWN

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.

Employee Name	Start Date
Job Title	

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 the floor, building, other appropriate facilities, etc.
- [ ] Escort employee to Page-Robinson Hall - as outlined in the Welcome to Brown onboarding email
  - 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
- [ ] Request building/space & system access (Workday, Zoom, Banner, Salesforce, etc)
- [ ] Meet with the ITSC to review computing needs (printers, shared drive access and email activation)
- [ ] Discuss departments practices and procedures
  - Standard work hours/schedule
  - Standing meetings
  - Vacation/sick policy
  - Time Tracking requests & approvals processes
  - University calendars & holidays
  - Supply requests
  - Evacuation procedures & emergency action plan

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.
- [ ] Explain Workday and where to find certain information on pay, time off, Workday Learning, etc.
- [ ] Arrange for employee to take campus tour

TWO WEEKS

- [ ] 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 and direct deposit
- [ ] Assign first project/task and draft initial goals
- [ ] Encourage employee to attend New Employee Orientation program (included in Welcome email)
- [ ] 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