**Mississippi University for Women**

**Office of Human Resources**

**Supervisor’s OnBoarding Checklist**

Helping a new employee get off to a good start makes a difference in the employee’s job effectiveness and overall welcome feeling. The checklist below serves as a guideline and best practice for supervisors and managers to help orient new employees and to fully engage them.

Completing the checklist at the intervals noted below (Pre-Arrival, First Day, First Week, First Month, and 3 Month) will assist supervisors in helping new employees to become successful and effective. To enhance the communication efforts, it is important to involve the new employee by asking for feedback often. Asking questions of the new employee can help determine the level of understanding of policies and procedures.

Always address performance issues when they arise to avoid future issues that can be more detrimental to the new employee and the effectiveness of the department.

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| **Employee’s Name:** |  | |
| **Job Title:** |  | |
| **Department/Unit:** |  | |
| **Start Date:** |  | |
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| **Date Completed** | **Pre-Arrival Checklist** | |
|  | Categorize any remaining applicants who are not in the final Workflow State in PeopleAdmin. Once a position is filled, the system triggers the emails to all applicants who are in the Not Hired category. This needs to be done as soon as the hire is finalized with an approved background check. | |
|  | After the completion of the background check, HR will provide start date options for the supervisor to confirm with the new hire. Once a start date is confirmed, HR will approve the hiring proposal in PeopleAdmin. | |
|  | New hires will receive an email (cc: supervisor) from HR Generalist with an appointment time for onboarding and information about employment eligibility documents they must bring to the appointment. Confirm new hire received the email and is aware of the required employment documents; advise where to park and first day arrival time. | |
|  | Inform current staff at staff meeting or via e-mail of the new hire’s start date and role. | |
|  | Prepare workstation/office set up (telephone, computer, office supplies, update “How To” desk manual, etc.). | |
|  | Allocate time to spend with new hire on first day. | |
|  | Prepare first day and first week agenda for new hire. | |
| **Date Completed** | **First Day Checklist** |
|  | Plan an official welcome and discuss the agenda for the first day (See New Employee Checklist (<http://www.muw.edu/hr/employees/newemployee>). |
|  | New employees must attend their scheduled onboarding appointment to complete employment paperwork. Appointments are held in Shattuck Hall and it is imperative the new employee be on time. Call x7222 for questions. |
|  | Explain structure of work area including MUW’s organizational chart (<http://www.muw.edu/ochart>). |

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|  | Explain PS 3302 – Email (sent to the employee’s MUW email address) is one of the main official communications of the University. <http://www.muw.edu/images/admin/policy/PS3302.pdf>. |
|  | Explain MUW policies, departmental policies and work rules to new employee <http://www.muw.edu/hr/employees/handbook>. |
|  | Request emergency contact numbers and explain procedure if the employee has personal or family emergencies. |
|  | Review emergency plan. |
|  | Explain procedure for knowing when the University is closed due to weather or other unexpected situations. Sign up for W Alert: <https://www.muw.edu/police/preparedness/walertsignup> |
|  | Provide a building tour including bathroom locations, emergency exits, etc. |
|  | Explain telephone/fax system, voicemail (if available), and email system. |
|  | Assist (personally escort employee, if possible) new employee with obtaining Employee ID (HR will tell new employee when this should be available), parking permit, and keys. |
|  | **Staff new employees:** HR generates Banner ID for the new employee during the onboarding session. HR requests the email address for the new employee once the Banner ID is generated. ITS will email new user information to the supervisor after the email is created. |
|  | **Faculty new employees:** HR will generate Banner ID and request email after the Hiring Proposal is approved in PeopleAdmin AND the employee’s biographical/ethnicity form is received. New faculty automatically receive a link to the forms when the Hiring Proposal is approved; however, HR will not generate the ID or request email more than 30 working days prior to the start date. The forms are available on the HR forms link. <http://www.muw.edu/hr/employees/forms>. ITS will email new user information to the Department Chair or Dean after the email is created. |
|  | Consider assigning new employee with a “buddy” to assist with 1st month transition into department. |
|  | Review the Information Security Policy in the Employment Handbook, <http://www.muw.edu/hr/employees/handbook#informationsecurity> as well as any departmental policies and procedures regarding security and appropriate use. |
|  | Have employee complete the Confidentiality and Security Agreement. (Original to be maintained in the department and a copy to be sent to ITS.) <http://www.muw.edu/images/admin/admin/hr/current/forms/confidentialityagreement.pdf> |
|  | Have employee complete the Conflict of Interest and Procurement Ethics Statement. (Original to be maintained in the department and a copy to be sent to Resources Management.) <https://www.muw.edu/images/admin/admin/resources/purchasing/documents/Conflict_Of_Interest_Procurement_Ethics_Statement.pdf> |
|  | Consider providing “A day in the life of ………” realistic preview of a typical day for the new employee’s position. |
|  | At the end of the first day, ask questions to determine employee’s understanding and discuss everything from the day. Ask employee for feedback. |
| **Date Completed** | **First Week Checklist** |
|  | Explain MUW’s Strategic Plan and the departmental plan and how the employee’s role fits. |
|  | Provide the new employee with a copy of their job description, performance expectations, work start time, lunch schedule, and other guidelines. |
|  | Explain 90-day performance appraisal policy in the Employment Handbook, <http://www.muw.edu/hr/employees/handbook#performancereview>. |
|  | Explain workplace reporting structure (departmental organizational chart). |
|  | Review department policies and procedures that apply to the employee’s role (attendance and punctuality, dress, personal calls, lunch, mail, e-mail, internet access, overtime/comp time (if appropriate), time records/attendance/leave records, work schedules, p-card usage, travel including reimbursement policy, weather and campus emergencies, etc.). |
|  | Introduce work for the employee to accomplish as a first assignment. Assist and coach as needed. |
|  | Arrange meeting for new employee to meet w/next level supervisor (unit manager, dean, supervising cabinet member, etc.). |
|  | Provide new employee with more details of departmental policies, procedures and practices. |
|  | Provide new employee with a campus tour. |
|  | Explain roles of key personnel (supervisor, team members, HR, University Accounting, etc.). |
|  | Explain filing and mail systems. |
|  | Inform new employee about regular scheduled staff meetings. |
|  | Organize essential department training. |
|  | Discuss mandatory new employment compliance training assigned by HR (vendor: Traliant) and Information Security Awareness training assigned by ITS. Employee will receive an email with a link to training and should complete it as soon as possible but no later than 30 days after start date. |
|  | Order business cards, if appropriate. |
|  | Ask questions to determine employee’s understanding of policies and procedures and discuss any issues. Ask employee for feedback. |
| **Date Completed** | **First Month Checklist** |
|  | Continue to clarify roles, responsibilities and expectations as needed and provide ongoing coaching and feedback. |
|  | Schedule weekly/monthly update meeting as needed. |
|  | Ensure that essential and mandatory training has been completed or is scheduled to be completed. |
|  | Ask employee for feedback. |
| **Date Completed** | **Three Month Checklist** |
|  | Complete 90-Day Performance Review (email received from HR Info and to be completed in PeopleAdmin) and share with the employee. Employee will receive a link in PeopleAdmin to acknowledge in the system. |
|  | Continue to clarify roles, responsibilities and expectations as needed and provide ongoing coaching and feedback. |
|  | Ask employee for feedback. |