# ONBOARDING CHECKLIST FOR SUPERVISORS



This resource is to assist supervisors or department representatives when onboarding new employees

Tools and resources for departments and supervisors are available at **www.oit.edu/hr/departmental-onboarding**.

Please forward questions to the Office of Human Resources, **oithr@oit.edu** or 541.885.1120.

## BEFORE START DATE

These are tasks that are recommended to be completed prior to a new employee's start date.

**Prepare Work Space & Tools**

- ☐ Identify office
- ☐ Order (as needed) and set up desk, chair, office supply basics, trash can, recycle bin, bookshelf, etc.
- ☐ Order (as needed) and schedule set up of computer, port, printers, scanners, etc.
- ☐ Schedule phone installation and request phone number
- ☐ Day before start date: ensure work space is prepared
- ☐ Work with ITS to ensure all relevant software is installed and operational, printers and scanners are connected, access to network is active

**Communicate Essentials to Employee**

- ☐ Inform of standard work schedule
- ☐ Provide information about any major dress expectations
- ☐ Discuss start time on start date and where to go when employee first arries
- ☐ Discuss specialized apparel and footwear, as needed

**Check in With Employee About:**

- ☐ Ergonomics (e.g. foot rest)
- ☐ Sensitivities or allergies to fragrances

- [ ] Sensitivities to lights or sounds
- [ ] Need to sit/stand/move around regularly

## Submit Access Form(s)

- [ ] Complete IT Employee Entrance Form in [TECHweb](#)
- [ ] Complete [System Access Request form](#)
- [ ] DegreeWorks
- [ ] T-Drive
- [ ] Astra
- [ ] Clearinghouse
- [ ] Papercut
- [ ] HEROES
- [ ] Shared calendars & email addresses
- [ ] Add to department listservs

## Develop Schedules & Schedule Meetings

- [ ] Schedule appointment with HR to drop off paperwork and/or present Form I-9 documentation (contact Sandi Hanan)
- [ ] Develop first week schedule
- [ ] Schedule campus tour
- [ ] Develop training schedule
- [ ] Schedule meetings with key contacts
- [ ] Contact Environmental Health & Safety to schedule specialized training for employees that will be in charge of a lab
- [ ] Identify mentor and discuss roles and responsibilities with mentor
- [ ] Schedule time for employee to obtain employee ID card and key fob, prox card, and/or keys

## Building Access

- [ ] Klamath Falls: Complete key fob request [form](#)
- [ ] Portland-Metro: Check with Trish Hower
- [ ] Salem: Check with the building manager

## Announcements & Directories

- ☐ Announce new employee to department and constituents
- ☐ Add new employee to directories and website
- ☐ Add employee to departmental mailing/distribution lists

## Order:

- ☐ Business cards
- ☐ Name badge
- ☐ Office name placard

## Request:

- ☐ PCard/department charge card (if applicable)
- ☐ Budget authority set up (if applicable)
- ☐ Set up/transfer grant responsibilities (if applicable). Contact SPGA, spga@oit.edu or 541.885.1734.

# ON START DATE

These are tasks that are recommended to be completed on a new employee's start date.

## Expectations and About the Department

- ☐ Review position description with employee and obtain signatures
- ☐ Discuss your (supervisor's) management style
- ☐ Discuss performance evaluations & timeline
- ☐ Provide letter of expectations, if applicable
- ☐ Discuss department structure (provide organizational chart, as needed)
- ☐ Discuss department culture, traditions, etc.
- ☐ Provide employee with a copy of first week schedule and training plans/schedules

## Introductions

- ☐ Introduce to team/department
- ☐ Introduce to mentor (if assigned)
- ☐ Introduce to customers/key contacts

## Building Orientation/Tour

- ☐ Bathrooms
- ☐ Breakroom
- ☐ Water fountain
- ☐ Mail room/stop
- ☐ Copiers & copier codes
- ☐ Printers
- ☐ Fire alarms and fire extinguishers
- ☐ AED and first aid kits locations
- ☐ Elevator
- ☐ Stairs
- ☐ Lockers
- ☐ Locker room
- ☐ Storage closets/rooms
- ☐ Recycling, compost, garbage bins

## Discuss Critical Procedures

- ☐ Evacuation procedures and meeting location
- ☐ Identify building evacuation coordinator
- ☐ Department 'code word' (prompts a co-worker to call Campus Safety/911)
- ☐ Procedure for reporting immediate safety concerns

## Discuss Department Policies & Procedures

- ☐ Department call in procedure
- ☐ Department time of request procedure
- ☐ Department breaks and meal periods
- ☐ Phone policy, long distance, preferred greeting, voicemail greeting
- ☐ PCard policies, as applicable
- ☐ Letterhead and correspondence formats, email signature
- ☐ Use of out of office assistant when absent and what to include

## Conduct and/or Help Employee Sign Up for Any Required Trainings

Visit www.oit.edu/hr/owl for registrations and course information.

- ☐ Discrimination & Harassment In the Workplace

- ☐ Safety

- ☐ Systems

- ☐ FERPA

- ☐ HIPAA

## IT Systems Introduction - As Needed

- ☐ Microsoft Office products

- ☐ Best browsers to use for systems

- ☐ T Drive and other network drives

- ☐ Office 365

- ☐ OneDrive

# FIRST WEEK

These are tasks that are recommended to be completed during the employee's first week.

## All Employees

- ☐ Check in with employee about ergonomics or other specialized needs

- ☐ Conduct one-on-one meeting (it is recommended that this be scheduled at the end of the employee's first week)

- ☐ Ensure employee has visited HR to present documents for Form I-9 (employment eligibility verification)

- ☐ Check in with the employee about how their first week went and take time to review training schedules and key policies, as needed

- ☐ Continue introductions, as needed

- ☐ Check in with employee about status of obtaining key fob/building access items and employee ID card, as needed

- ☐ Explain how the employee's role fits in the work group and department

- ☐ Make note of and follow up on any questions or concerns the employee brings up

- ☐ Verify that computer, network systems, printer, email, telephone, voicemail, etc. are working and ensure that designated printer is set as default.

- ☐ Provide Sandi Hanan with employee's office number, phone number, and fax number - this will update the university web directory

- ☐ Check in with the employee to ensure they have the tools and resources necessary to perform their job

- ☐ Begin working with employee to identify performance goals to be achieved in the next six months (classified)/six to twelve months (unclassified)

Faculty

- [ ] Faculty Senate
- [ ] Faculty Handbook
- [ ] Academic Catalog
- [ ] Academic Advising Handbook
- [ ] Preventing plagiarism
- [ ] Student Affairs

# FIRST MONTH

These are tasks that are recommended to be completed during the new employee's first month.

Reminders:

- [ ] Answer employee's questions and help foster engagement with the university
- [ ] Schedule and conduct weekly or bi-weekly meetings with the employee and provide constructive feedback
- [ ] Schedule ergonomics assessment with EH&S. 541-885-1556 or Sherry.Himelwright@oit.edu.
- [ ] Check in with department members for their perspective regarding the new employee
- [ ] Describe the department's strategies and goals and how they relate to university goals
- [ ] Work with employee to set short-term and long-term goals
- [ ] Have a welcoming social event for the new employee and invite department members and key contacts
- [ ] Invite employee to Oregon Tech campus-wide events and introduce them to others
- [ ] Provide employee with information on various community outreach opportunities (clubs, outdoor activities, associations, etc.)
- [ ] Continue introductions, as needed
- [ ] Early in first month: Work with employee to finalize performance goals to be achieved in the next six months (classified)/six to twelve months (unclassified)

# FIRST THREE MONTHS

These are tasks that are recommended to be completed during the new employee's first three months.

Reminders:

- [ ] Regularly provide informal feedback
- [ ] Work with employee to establish a training schedule and/or improvement plan to meet future goals
- [ ] Encourage employee to attend Oregon Tech campus-wide events and introduce themselves to others

- [ ] Celebrate successes and recognition of employee's contributions
- [ ] Review performance goals with employee
- [ ] Review issues or challenges and identify ways to resolve them
- [ ] Ensure the employee has completed required trainings
- [ ] Answer questions and help foster engagement with the university
- [ ] Provide employee with networking resources
- [ ] Provide additional information on various community outreach opportunities

# SIX MONTHS

These are tasks that are recommended to be completed during the new employee's first six months.

## Reminders:

- [ ] Determine and discuss performance goals to be achieved in the next six months (second six months of employment) with the employee
- [ ] Regularly provide informal feedback
- [ ] Celebrate successes and recognize the employee's contributions
- [ ] Review the department onboarding process with the employee - What is working well? What is missing?
- [ ] Schedule annual performance review (approximately 1 year after start date)

## Trial Service

These are tasks required for supervisors of classified employees ONLY.

Contact Human Resources prior to six month point if issues arise.

- [ ] Develop written trial service evaluation
- [ ] Conduct trial service evaluation meeting with employee

# FIRST YEAR

These are tasks that are recommended to be completed during a new employee's first year.

- [ ] Regularly provide informal feedback
- [ ] Encourage/help employee to get involved with on campus committees or cross-functional teams (if appropriate)
- [ ] Conduct annual performance review
- [ ] Celebrate the successful completion of the employee's first year (recommended: team lunch/dinner)
- [ ] Discuss employee's professional development goals and identify relevant learning opportunities
- [ ] Gather feedback and suggestions from the employee on ways to improve the department onboarding experience