



SUPERVISOR ONBOARDING CHECKLIST

New Employee Name: _____ OtterID _____ EmplID _____

Use this checklist as a guide to help onboard your new hire successfully! NOTE: Ensure employee attends their First Day Onboarding Session to complete appropriate paperwork before the employee reports to their work location.			
Division/Office:		Start Date:	
Classification:		Supervisor:	
	Major Activities/Tasks to Complete	<input checked="" type="checkbox"/> Box if Complete	
Phase 1: Pre-Arrival	Assign mentor/coach/buddy (co-worker, lead worker) and meet with that person to discuss their role during the onboarding process.	<input type="checkbox"/>	
	Send an email announcement about your new hire	<input type="checkbox"/>	
	Submit an IT Ticket for department specific access, e.g. M drive access, etc. See link below for services automatically provided to new employees: Employee Onboarding Access	<input type="checkbox"/>	
	Prepare new employee's workspace (clean desk/workstation, gather basic supplies & equipment, computer, phone, etc.)	<input type="checkbox"/>	
	Prepare first day/week information to cover with employee	<input type="checkbox"/>	
	Update phone lists, organizational charts, prepare welcome packet and other department items	<input type="checkbox"/>	
	Schedule time with new employee (1-on-1) on first day and throughout the first two weeks	<input type="checkbox"/>	
Phase 2: First Day	Provide for the employee: <ul style="list-style-type: none"> Name Badge or name plate Computer and/or phone password/login instructions Organization telephone directory 	<ul style="list-style-type: none"> Business cards Mentor/coach/buddy meeting scheduled Additional supplies/keys/equipment (if applicable) Dept contacts in event of an emergency 	<input type="checkbox"/>
	Review important locations (office tour): <ul style="list-style-type: none"> restrooms break/lunch room copier emergency exits 	<ul style="list-style-type: none"> mailroom/file room/supply room recycling related/adjacent departments/offices CSU Dashboard review parking logistics 	<input type="checkbox"/>
	Introduce to co-workers/team members		<input type="checkbox"/>
	Review position description, responsibilities, performance evaluation process and schedule		<input type="checkbox"/>
	Attend introductory meeting with employee and mentor/coach/buddy		<input type="checkbox"/>
	Review Job Training Plan (if applicable), job aids and references		<input type="checkbox"/>
	"Touch base" meeting (end of day to answer questions, review important information, discuss office protocols, confidentiality, provide encouragement, reinforce positive expectations, etc.)		<input type="checkbox"/>
	Complete Work Schedule Designation form (Breaks & Lunch period) & Review Time/Absence Reporting (overtime procedures)		<input type="checkbox"/>
Extras: welcome sign, dept. swag, lunch w/employee		<input type="checkbox"/>	
Phase 3: First 2-weeks	Review files/projects/documents		<input type="checkbox"/>
	Review Safety & Emergency (emergency procedures/evacuation instructions/manual) University Police - Programs & Services		<input type="checkbox"/>
	Review work practices, procedures, protocols (e.g. calendar sharing, email settings, vacation/sick leave requests, update directory, casual Friday's)		<input type="checkbox"/>
	Review required online training		<input type="checkbox"/>
	Review Driving on University Business : Defensive Driving program & Travel Policy (if appropriate)		<input type="checkbox"/>
	Allow work time to pick up OtterID and Parking Permit		<input type="checkbox"/>
	Ensure employee has attended (registered for) formal new employee orientation		<input type="checkbox"/>
	Establish baseline goals for performance (continue to provide meaningful work)		<input type="checkbox"/>
Phase 4: First 2-months	Ensure required training has been completed (FERPA, Eliminate Sexual Misconduct, etc.)		<input type="checkbox"/>
	Meet with mentor/coach/peer partner to receive feedback		<input type="checkbox"/>
	Provide regular feedback and training as necessary to assist employee with development		<input type="checkbox"/>
	Meet with employee to discuss experiences and how they align with expectations		<input type="checkbox"/>
	Review and monitor progress toward initial goals		<input type="checkbox"/>