



## New Employee Onboarding Checklist

Directions: This checklist is designed to assist the department with a new employee orientation process. Onboarding is a long-term process that begins before an employee's start date and continues for at least six months to a year. This checklist is organized chronologically to help Supervisors and Managers prepare for the arrival of a new employee. Once an employee starts, he/she can work together with the Supervisor and an onboarding mentor\* to complete the checklist. The Supervisor may add additional activities that are specifically relevant to the new employee's position. The checklist may be adjusted to be used for internal transfer employees as well.

\*An "onboarding mentor" is a mentor to the new employee who can assist in the onboarding process and be a "go-to" person as directed by the manager. It could be a peer within the same or related organization.

### Pre-Arrival

- Call to officially welcome the new employee and to confirm start date and discuss materials they will need to bring with them on the first day (e.g. two forms of ID.)
- Provide new employee with a contact to reach out to in the event of a question or concern
- Inform them where to park on the first day
- Create an onboarding schedule for new employee
- Clean and prepare new employee's work space. (Make arrangements for cleaning, computer, phone, etc.)
- Set up office with computer, phone, file and any other resource that will be needed
- Send an announcement via email to the department and campus if applicable, announcing the new hire and start date
- Provide an instruction manual for any necessary software he or she will be using
- Order office supplies and name plate
- Organize a lunch for the new employee with members of the team or department for the first day

### Arrival

- | 1 <sup>st</sup> Day  | Responsibility |
|--|----------------|
| <input type="checkbox"/> Be present to welcome new employee. Take new employee to their worksite, i.e. office, cubical, work station | Supervisor     |

#### Department Onboarding

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|---|------------|
| <input type="checkbox"/> Officially introduce new employee to members of the department and people in their work area | Supervisor |
| <input type="checkbox"/> Provide time for new employee to meet with HR to   |            |



### 1<sup>st</sup> Month

- |                          |   |            |
|--------------------------|---|------------|
| <input type="checkbox"/> | Schedule and conduct regularly occurring one-on-one meetings  | Supervisor |
| <input type="checkbox"/> | Continue to provide timely, on-going, meaningful "everyday" feedback  | Supervisor |
| <input type="checkbox"/> | Continue introducing employee to key people and bring him/her to relevant events  | Supervisor |
| <input type="checkbox"/> | Arrange for employee to take campus tour (if not already completed)   | Employee   |
| <input type="checkbox"/> | Ensure employee is signed up for required and suggested education and development programs  | Supervisor |
| <input type="checkbox"/> | Invite employee to Skidmore wide events (such as the Community Coffee Hour, Networking Luncheon/Breakfast, Community Meetings etc.) and introduce him/her to others | Supervisor |

### Three Months

- |                          |  |            |
|--------------------------|--|------------|
| <input type="checkbox"/> | Continue regularly scheduled one on one meetings to review project updates and answer any questions  | Supervisor |
| <input type="checkbox"/> | Review issues or challenges and identify ways to resolve   | Supervisor |
| <input type="checkbox"/> | Check on education and development status (New Employee Orientation, Anti-Harassment, etc.)  | Supervisor |
| <input type="checkbox"/> | Meet for informal (verbal) performance "check-in"  | Supervisor |
| <input type="checkbox"/> | Review essential duties and assign specific goals  | Supervisor |
| <input type="checkbox"/> | Ask employee: <ul style="list-style-type: none"><li>• What is lacking - education, development &amp; training, tools, information etc.</li><li>• Their understanding/perception of how the organization operates</li><li>• Questions they have</li><li>• Suggestions and ideas they have</li></ul> | Supervisor |
| <input type="checkbox"/> | Ongoing conversation   | Supervisor |

### Six Month s

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|--------------------------|--|------------|
| <input type="checkbox"/> | Conduct six month review prior to the expiration of probationary period, if applicable. If supervisor has concerns regarding a new employee's performance, please reach out to HR to investigate strategies to help new employee be successful | Supervisor |
| <input type="checkbox"/> | Continue to touch base, review performance standards, expectations, project updates and answer any questions   | Supervisor |
| <input type="checkbox"/> | Continue to review issues or challenges and identify ways to resolve   | Supervisor |
| <input type="checkbox"/> | Continue to provide regular informal feedback  | Supervisor |
| <input type="checkbox"/> | Review the onboarding process with the employee - is it working well? What is missing?   | Supervisor |
| <input type="checkbox"/> | Discuss and provide professional development opportunities   | Supervisor |

### First Year between Six and Twelve Months

- |                          |   |            |
|--------------------------|---|------------|
| <input type="checkbox"/> | Celebrate successes and recognition of employee's contributions | Supervisor |
|--------------------------|---|------------|

- If appropriate, support and encourage employee participating on either a Campus committee or cross-functional team