



## Onboarding Checklist - Supervisor

Below is a list of items that should to be completed prior to and during employee's first month of employment.

### Prior to your Employee's First Day

- If applicable, prepare and send offer letter (ensure HR receives a copy).
- Ensure employee understands the [IRS tax liability](#) of travel/relocation reimbursement, if applicable.
- If position requires a degree, request that employee has an Official Transcript, confirming their highest degree earned, be sent to HR.
- Complete [Employment Authorization \(EA\)](#) (send to HR).  
**NOTE: Once New Hire Paperwork & EA are both completed, HR will send Arrival Notice to UCS to Grant Access.**
- Encourage the new employee to complete [New Hire Paperwork](#) with HR.
- Confirm agenda for first day and discuss expectations (i.e. work schedule, pay schedule, dress code, etc.).
- Ensure employee's work station and computer are set up.
- Request employee's extension is reset, and obtain [Long Distance Code](#) from [Telecom](#) (if applicable).
- Provide employee with [Campus Map](#) and information about [parking](#).

### On Employee's First Day

- Be available when your employee arrives, and throughout their first day for questions they may have.
- Introduce them to co-workers.
- Provide contact information for department personnel and other critical contact information.
- Consider making lunch plans for their first day, invite co-workers to attend (optional).
- Show employee how to use Portal, WolfWeb, [Moodle](#) (if applicable), the online Campus Directory, and other relevant functions on the University's website.
- Request access to applicable Drives and request [Banner Access](#).
- Explain the important procedures for your Unit and critical University policies:
  - How to request time off
  - Who to call if they are sick or late
  - Inclement weather policy, campus closures, late starts (identify essential personnel)
  - Emergency procedures and building evacuation plan
- Verify office procedures including how to request time off.
- Ensure they have access to co-worker's calendars and coordinate daily, weekly schedule including rest periods and lunch break.

*(Continued on reverse).*

- Take them on a tour of the work unit/building and the campus, to include:
  - Places to eat
  - ATM
  - Restrooms and break rooms
  - Copy/fax areas
  - All other buildings relevant to their position
- Ensure they have received ID card on the 3<sup>rd</sup> Floor of Human Resources.
- Take employee to [Key Shop](#) to obtain office/building keys / [Order Name Plate](#).
- Order [Business Cards](#).
- Explain departmental procedure for ordering office supplies, set up P-card training if needed.
- Issue and discuss position description. Including reviewing process for which their work is evaluated.
- If applicable, show them how to access collective bargaining agreement.

### **During Your Employee's First Month**

- Ensure they've [enrolled for benefits](#) within first 30 days.
- View [University Organizational chart](#).
- Complete Online trainings (i.e. [Preventing Workplace Violence](#), [Shots Fired](#), [Hazard Communication](#)).
- Attend [New Employee Orientation](#) (NEO).
- Consider assigning a mentor in the Unit/Department to provide support and answer questions.
- Add them to the Department's mailing list, contact list, webpage.
- Update department Organizational Chart, send to HR.
- Provide coaching to recognize and reinforce positive task performance and progress.
- Provide counseling to redirect task performance or correct behavior where or when needed.
- Begin on the job training.