

Onboarding Checklists Form

BEFORE your new employee starts.

Hiring Manager's PREHIRE Checklist	
	1. Prepare HRAF for search – attached job description 2. Create search/hiring committee a. Review: i. Search Committee Guide ii. Chart of Roles and Responsibilities iii. Reference Check Guide iv. Interview Guidelines v. Common Biases vi. Campus Visits and Interviews vii. ADA and Search process 3. Once HRAF to search approved a. HR will create shared folder for committee/hiring manager – all applicant data is placed in this folder 4. Screen and interview candidates 5. Notify HR of your final 2 candidates with request for background check a. must provide candidate name and email address; HR will notify you of the results 6. Make final candidate selection 7. Prepare HRAF to hire - attach resume and job description 8. Once HRAF to hire is approved, HR will a. Offer letters prepared and sent to candidate i. Exempt and Faculty employee - President signs offer letter ii. Non-exempt employee – HR signs offer letter b. send new hire paperwork to candidate – once this is received back, payroll creates the employee profile in APS c. send hiring manager with “post offer” email d. notify other candidate’s “position is filled” email e. create Banner ID and sends out Centenary team email f. email candidate with benefit orientation meeting schedule (include links / directions on next steps with request for shirt size)
	STEPS ONCE CANDIDATE ACCEPT OFFER
	Facilities Check with Facilities to ensure office is available and cleaned with appropriate “good condition” office furniture
	Computer hardware set-up • Secure Laptop/Desktop, other peripheral equipment, and phone from IT • Provide IT with list of short-cuts to be placed on new employee desktop, ie. cisco VPN, DocuSign, LeapFile, Canvas, Banner Web, Banner, eSelfServe, Zoom, MicroSoft Teams, Certify, etc.

	○ Train employee how to access
	College Purchasing Card – if the new employee is to be issued a credit card click on Credit Card Request to initiate the process. The Business Office will work with the new employee to establish Certify training. Schedule this with the Business Office.
	Business Phone Line – contact IT Svcs to update the phone line assigned to this position to the name of your new employee. Check with IT to get phone training/manual to the employee.
	Business Cards and Office – if business card is appropriate for the position, email the information to tina@redriverprint.com, and copy Aubrey Salazar (adsalazar@centenary.edu) on your order. A proof will be sent before printing. Please specify whether this is for an athletic business card order. EMPLOYEE WILL THIS IN 1st WEEK
	Office / name plate – email tina@redriverprint.com, and copy Aubrey Salazar (adsalazar@centenary.edu) the new employee's name and title requesting an office name plate/tag be made
	Website Directory – submit a marketing request asking for a new hire to be added to the directory at centenary.edu/mcrequest containing the following new employee information below: • Employee name • Position title • Department • Degree and college name ○ information can be found on the employee resume you received during the search/recruiting for the role • College email address ○ Contact IT for this information • Office phone number ○ Contact IT for this information • Building/room number

	Workstation • check with Facilities and/or submit a work request to designate, prepare and clean the new employee's workstation/area so that it is in good order upon their arrival. • SWAG – arrange to have some college branded material/items available to the new employee, i.e. coffee mug, stationery, water bottle, pens/note pads ○ Admission office will supply a t-shirt ○ Mark Miller will supply coffee mug • Have the following on the new employee's desk: ○ Paper clips and holder ○ Scissors ○ Tape and dispenser ○ Post-it notes ○ Pens ○ Note pad ○ Safety cleaning supplies – click here to order supplies ○ Mouse pad ○ College map ○ Names and contact numbers pertinent to your area ○ College organization chart • <i>Welcome card signed by President – contact Connie and perhaps present a welcome card signed by you and other members of your staff</i>
	Key requests – within the first week prior to the new employee start date, the manager/supervisor should e-mail DPS with a request for keys to specific areas. • Campus IDs • Key Request • Key Issuance Policy • Electronic Locks
	Parking/Vehicle Registration – direct the new employee to https://centenarycollege.omnigo.one/CESIReportExec/OPR/ to register their vehicle and prompt DPS to send new employee a parking decal
	Campus IDs - You or a designee will need to escort the new employee to the Department of Public Safety in Centenary Square, Suite 214A (between 1 p.m. and 5 p.m. while school is in session) or call 318.869.5164 to set up an appointment. DPS will provide the new employee with their ID badge, parking decal, and office keys

	Establishing the Start Date - Call your new employee to ensure they know what time, where to, and to whom they will report on their first day! ○ Parking – inform the new employee of where to park and how to access their building. ○ Dress code – inform the new employee of any dress requirements. ○ Make sure the pertinent staff in your office also know about the new employee's start date including name and position.
	Training – determine the training schedule for your new employee. Who and when someone will work with to train on the new employee's areas of responsibility? Have a first work assignment prepared, i.e. Banner web, Docusign, etc. Schedule training
	Manager to show employee campus and or Assign a Buddy - Many of the items on day 1 can be assigned to an buddy/assistant in your office. Be sure this person has been with the college for at least a year, has a good performance history, is proud of their employer, and is skilled enough in the employee's job or the department to provide adequate knowledge. Also make sure the buddy/assistant has the time to help with the onboarding, is patient, and is a good communicator. Basic Checklist of items to cover with new hire on day 1: restrooms, safety, post office, cafeteria, campus orientation/map
	Network ID/email: contact IT Svcs to ensure new employee has been established with access to college network and email account.

Onboarding Your New Employee Checklist	
DAY 1	
Logistics	
	Greeting: Greet your new employee and show them to their office/ work area. If you are scheduled to be out of office on their first day, make arrangements for "buddy" or another staff member to meet the new employee.
	Network ID/email: Assist the employee with log on instructions to college network and email <u>OR</u> assign this to their "buddy"
	Tour: Give your new employee a tour of the department/building and make introductions to key department personnel along the way. Be sure to show them where the restrooms and breakrooms are!
	Contacts: Let the new employee know who they can go to for general questions, especially when you are not available. This is often the department administrative assistant or their assigned "buddy."

	ID Badge and Parking Permit: if the new employee has not already done this, walk them to the Safety office to get their ID badge and parking permit <u>OR</u> assign this task to their “buddy.” (Note, parking permits require registration on the portal first.)
	Equipment: Issue any keys, tools, or other equipment needed for the job. Explain where and how to get supplies and materials.
	Phone System: Show your new employee how to work the college’s phone system. If they have been assigned their own extension please provide that to them.
	Business Cards and Name Badges: if you have not completed this assigned task already you are responsible for showing the employee how and where to order their business cards.

One-on-One Meeting	
	Meal Breaks: Ensure they know about food options on campus and breakrooms where they can eat their lunch/dinner and any relevant policies about leaving campus for meal breaks. <i>If the position warrants, take the new employee to lunch on their first day.</i>
	Determine Expectations – set job priorities and clearly communicate to your employee your expectations of their work performance. Review job description.
	Department Specific Policies: be sure your new employee knows about any department-specific policies such as scheduling leave (vacation, sick), reporting tardiness/absence, break periods, equipment access/operation, training, <u>safety precautions</u> (fire evacuation and tornado shelter procedure), smoking, visitors, etc.
	Performance Reviews: if applicable, let your new employee know that there will be a 30-day, 60-day, and 90-day performance review.
	HR Orientation – HR will contact the new employee and schedule an HR Orientation meeting to cover benefits and other college offerings.
	Payroll – the new employee should schedule some time to meet with Linda Montgomery to cover pay date, eSelfServe and time reporting responsibilities.
	Designee or Buddy - the assigned “buddy” will: - Take the new employee on a detailed tour of the college - Stop by DPS to get keys, badge and parking decal - Show the new employee our college website specifically addressing department areas: IT, HR, DPS, Business office, Facilities, Marketing and Safety; as well as the employee web directory - Ensure new employee knows how to log on to the network, up to and including our VPN - Cover how to submit an IT work order, Facilities work order, etc.

End of Day	
	End of Day: at the end of the day, visit with the employee for feedback. Remind them that you are happy they are here and you look forward to seeing them tomorrow.

ONE WEEK LATER	
	Check-in: Plan a 30-minute one-on-one meeting and get feedback on experiences so far including what they may need to get their work done. Review employee's understanding of the duties so far.
	Department Specific Policies: you did this on day 1 but it's time to review again.
	Benefits Enrollment: remind the employee to stay current with HR about their benefits enrollment.
	Training: Remind the new employee about the college-required training for orientation and inquire if they are having any problems accessing or have questions about the content so far. (Note: LMS project under construction –the plan is to a training plan all new employee's); remind the employee to stay current on their assigned training.
	Other: • <u>Review of employee handbook and guidelines</u> • Review of the expense reporting procedure • Review of HR point of contact and how to: ▪ Request support ▪ File a complaint ▪ Navigate employee concerns • Familiarity and comfort with role expectations and responsibilities • Familiarity with navigating time and attendance procedures
TWO WEEKS LATER	
	Meet to discuss progress.
AFTER FOUR WEEKS	

- Meet to evaluate and review performance. Identify areas of strength and needed growth. Note any performance problems in file to HR, if necessary.
- Review and record what's working well
- Review and record what's not working well or needs attention
- Review performance with day-to-day systems and address any concerns
- Ensure employee has all the necessary equipment, tools or resources required
- Examine the first project or work product
- Solicit feedback from relevant managers and colleagues
- Solicit feedback on their onboarding experience and what went well and what could use more attention (and use for future onboarding!)
- Schedule 90-day check-in meeting

Employee work performance

- If new employee is regular staff non-exempt employees, a probationary performance review is required. Click on and complete the [Probationary Period Performance Appraisal Form](#) and return form to HR

What needs improvement

- Consider feedback from other employees and peers
- Consider areas of opportunity to help enhance the employee's performance

What's going well

- Tease out a project that they've contributed to and highlight their success
- Deliver positive feedback you've heard from others
- Ask what they've enjoyed working on and weave it into their next 90 days

A look at the next 90 days

- What does the employee need to be aware of in the coming weeks and months?
- Goal set for how to achieve maximum potential
- Plan for deadlines, initiatives and imminent changes