

BEFORE THE EMPLOYEE’S START DATE

Outcomes: *The employee finds a welcoming environment with knowledgeable colleagues and a fully equipped work station; new employees feel settled in by the end of their first day.*

Schedule and Job Duties

<input type="checkbox"/>	Call employee.
<input type="checkbox"/>	Confirm start date and time, location, parking arrangements, dress code, etc.
<input type="checkbox"/>	Identify computer needs and requirements.
<input type="checkbox"/>	Provide name of their onboarding buddy.
<input type="checkbox"/>	Remind employee to complete any orientation tasks that are needed (bring information for I-9, insurance forms if applicable, etc.).
<input type="checkbox"/>	Add regularly scheduled meetings (e.g., staff and department) to employee’s calendar.
<input type="checkbox"/>	Prepare employee’s calendar for the first two weeks.
<input type="checkbox"/>	Plan the employee’s first assignment.
<input type="checkbox"/>	Send insurance information and employee handbook.

Socialization

<input type="checkbox"/>	Email department, team, and/or functional unit of the new hire. Include start date, employee’s role, and bio. Copy the new employee, if appropriate.
<input type="checkbox"/>	Set up meetings with critical people for the employee’s first few weeks.
<input type="checkbox"/>	Arrange for lunch with the appropriate person(s) or buddy for the first day and during the first week.
<input type="checkbox"/>	Select the buddy.
<input type="checkbox"/>	Meet with the buddy, and provide suggestions and tips.
<input type="checkbox"/>	Arrange for a building tour.
<input type="checkbox"/>	Send employee welcome video.

Work Environment

Assemble an informational packet from the department and include job description, welcome letter, contact names and phone lists, campus map, parking and transportation options, mission and values of the institute, background on your unit, etc.	
<input type="checkbox"/>	Clean the work area, and set up cube/office space with supplies.
<input type="checkbox"/>	Order office or work area keys.
<input type="checkbox"/>	Order business cards and name plate.
<input type="checkbox"/>	Arrange for parking, if needed.
<input type="checkbox"/>	Add employee to relevant email lists.
Technology Access and Related	
<input type="checkbox"/>	Order technology equipment (computer, printer, smartphone) and software.
<input type="checkbox"/>	Contact IT to have the system set up in advance.
<input type="checkbox"/>	Arrange for access to common drives, and coordinate password authorizations.
<input type="checkbox"/>	Arrange for phone installation.
Training/Development	
<input type="checkbox"/>	Begin creating a 90-day learning and development plan.
<input type="checkbox"/>	Arrange pertinent trainings required for the job.