

Supervising New Employee Onboarding

Checklist & Guide

This checklist provides supervisors with essential resources and talking points to ensure a thorough onboarding experience for new employees, and should be completed with the new employee during their first week of work.

Make Introductions

- ☐ **Introduce New Employee to Team Members**
  These introductions can occur as you provide a facility tour or during a team meeting.

- ☐ **Create and post an internal announcement about the new hire**
  Have the employee write a quick paragraph about themselves that you can share with your team in an email announcement.

  Use the employee's paragraph to help you write the email announcement. You should also be sure to include information about the employee including their name, the title of the role they'll be doing, what work they'll be doing, where they will be located, what team(s) they'll be working with, information about their professional and educational background and contact details where appropriate.

- ☐ **Schedule meetings with key contacts and departments (if applicable)**

- ☐ **Organize or encourage the new employee to plan activities that will help them get to know their peers. The following 2 optional tasks are highly recommended:**

  1. **Instruct New Employee to Schedule Meet-and-Greet 1:1 sessions with all team members**
     - *Have the employee reach out and meet with each team member for a 20 min "meet-and-greet." The employee can do this after you share the org. chart and directory with them. Explain that these meet-and-greet session is a time for them to introduce themselves and learn about the roles of each team member.*
     - *Typically this is done in the first few weeks as it helps break the ice for new employees.*

  2. ***Select an employee on your team to become an "Onboarding Mentor" to the new hire***
     - *A peer-to-peer mentorship that starts as soon as the new hire joins your team is a great way to onboard employees. Similar to a student on the first day at a new school, a new employee may be wondering who everyone is, how things work, and how they fit into the team. Onboarding mentorship plays an important socializing role in easing a new employee's possible anxiety and making them feel part of the team.*
     - *Review who and how they will mentor the new employee.*

Ensure Hiring Paperwork Completion

- [ ] **Ensure employee completes I-9 form for work eligibility**
  Ensure employee has set-up appointments with business services or transaction center to complete in-person portion (if applicable).

- [ ] **Encourage employee to complete income tax forms (W-4, SSN card)**
  At USU, you are defaulted to a filing status of single and allowances of 0. If you want to update your W-4 Tax Form, please review the Electronic W-4 Instructions at usu.edu/controllers/teams/payroll/electronic-w4.

- [ ] **Encourage employee to set-up Direct Deposit**

> ***Example Script***
> *"To set up Direct Deposit visit my.usu.edu, log in, click "Common Tools," then "Banner Dashboard." From there, in the 'All Users' section, you can select "Direct Deposit" and enter your routing and account numbers."*

- [ ] **Encourage employee to update Emergency Contact information**

> ***Example Script***
> *"To update Emergency Contacts visit my.usu.edu, log in, click "Common Tools," then "Banner Dashboard." From there, in the 'All Users' section, you can select "Personal Information" and update emergency contacts and other personal information."*

Hold Supervisor and Employee 1:1 Session(s)

- [ ] **Agenda:**
  - *Determine the name employee wishes to be called.*
  - *Ask questions about their hobbies, what they enjoy doing outside of work, and what they're passionate about.*
  - *Ask how they prefer to learn such as watch someone, written instructions, figuring it out on their own.*
  - *Ask what motivates them to be successful, such as recognition or working independently.*
  - *Ask about their short-term and long-term career goals.*
  - *Ask about their preferred communication style and discuss your preferred communication style and work schedule.*
  - *Share your professional background and history.*

Dept/Team Orientation

- [ ] **Discuss and provide department/team organizational chart(s)**
- [ ] **Introduce peer departments/other stakeholders**
- [ ] **Introduce USU Directory**
  usu.edu/directory
  Review your own team contact list.

- [ ] **Review department/team Mission, Vision and Goals**
- [ ] **Review department priorities/key projects for coming year**
- [ ] **Describe the team's regular and annual events, activities and celebrations, and clearly explain expectations for employee participation**

> ***Example Script***
>
> *"Our team holds required monthly meetings on the first Thursday of each month. In addition, we have optional activities like a fall retreat in August, a holiday lunch in December, a summer service project in July, and celebrations for staff milestones during team meetings. Team meetings are mandatory unless otherwise excused, while participation in other events is encouraged to build connection, but optional. Let me know if you have any questions about these activities or expectations."*

- [ ] **Discuss behavior expectations and team values**
- [ ] **Discuss dress code or expectations**

> ***Example Script***
>
> *"In our team we maintain a [choose: business casual/business professional, or other] dress code. Here are some key guidelines to keep in mind:*
>
> - *Attire: We expect employees to dress in a manner that is neat, clean, and appropriate for the workplace. [tailor this section with specifics: for example, on Fridays jeans are acceptable and we wear Aggie colors/designs]*
> - *Footwear: [specify expectations, such as closed-toe shoes, appropriate for office settings, etc.]*
> - *Exceptions: any specific requirements for certain events (e.g., client meetings or presentations), we may ask for more formal attire.*
>
> *Our dress code is in place to ensure a respectful and professional atmosphere, and I encourage you to ask if you ever have questions about what's appropriate."*

- [ ] **Explain regular team meetings**

Discuss schedules and purposes for recurring dept/team meetings (For example: huddles, all staff meetings, vendor status updates, retreats, etc.) and send calendar invitations for them to the new employee.

Discuss any preparation needed on the employee's part for these meetings.

- [ ] **Share virtual meeting expectations (if applicable)**

Discuss team standards regarding camera on/off, mic muting, appropriate backgrounds, engagement, use of chat/emoticon features, etc.

- [ ] **Share calendar expectations**

What do you want employees to list in their calendars? Vacation Time? Tasks? Out of Office?

Who do you want them to share it with?

Share your calendar with them.

☐ **Required training expectations**
Walk through Learn Blue.

> ***Example Script***
>
> *"Learn Blue is our learning management system (LMS), which is powered by Absorb. Through Learn Blue, you'll complete required employee training modules, view development opportunities like leadership programs, and access to LinkedIn Learning programs. You should see an onboarding curriculum and other courses you've been automatically enrolled in by scrolling down to your "Enrolled Courses" section."*

Share that mandatory trainings are due in 30 days of hire.

Stress the importance of Title IX (Sexual Misconduct Prevention) training.

Explain that in the future, they'll complete annual compliance from July - October each year.

Position/Role Orientation

☐ **Review full position description (different from advertisement) with the new employee and discuss role expectations and responsibilities**
Give the new employee a digital copy of the position description.

☐ **Review expectations (for example: Where do you expect them to be or progress with assigned projects at 30, 60, 90 days?)**

☐ **Discuss ADA accommodations and support**

> ***Example Script***
>
> *"If you ever need accommodations related to a disability or physical limitation, please don't hesitate to let me know so we can ensure you have the support you need to succeed."*
>
> Tip: If your employee requests an accommodation that is disability-related, and the request is outside of your standard processes and procedures, please contact HR or provide your employee with the information to do so.

☐ **Discuss the employee's probationary period (See Policy 3307)**

> ***Example Script***
>
> *"During your introductory period of [six months for non-exempt / one year for exempt], we'll both assess how well you're adapting to your role and whether it's a good fit for you and the team. You'll still have access to employee resources and benefits (if applicable) during this time, but either party can choose to end the employment relationship without obligation or a grievance process. My goal is to provide you with support and guidance throughout this period, so please feel free to reach out with any questions or concerns."*

- [ ] **Explain performance check-in schedule/frequency and purpose**

> ***Example Script***
>
> *"After your introductory period, we will have a performance and development check-in every [specify your team's frequency - e.g., quarterly, semi-annually - and the months they'll occur]. These check-ins are part of an ongoing conversation focused on your growth, success, and career development.*
>
> *You'll receive a system notification that links you to the ServiceNow form. In the form, you'll be prompted to reflect on your recent accomplishments, how you've contributed to a respectful workplace, and your efforts toward continuous improvement. You can also set goals by selecting the 'Create a New Goal' option under the Goals section on the right-hand navigation bar. This helps us track your progress, discuss timelines, and identify resources you may need.*
>
> *Once you've completed your section, I'll add my feedback and observations on the same topics. We'll then meet live to review what we've both written, talk about goals, set expectations, give and receive feedback, and identify any training or support that can contribute to your success. After our discussion, we'll both sign off on the form to finalize the process."*
>
> *(Show the employee where to access the check-in form in ServiceNow, explain how the workflow queue works, and clarify what to expect at each step. You might demonstrate this on your screen.)*

- [ ] **Set performance expectations for the employee's role**
  Sample topics: collaboration/team work, time management, student and customer service, adaptability and problem solving, integrity, accountability and ownership.

- [ ] **Ongoing 1:1 schedule with supervisor**
  Explain how frequently the employee can expect these 1:1 sessions with you to occur.

- [ ] **Discuss quality requirements**
  Sample topics: completing work with accuracy, efficiency, building and maintaining relationships, abiding by university-wide or industry standards.

Provide a tour of work facility/campus and show the employee the locations of the following:

- [ ] **Fire extinguisher/alarm locations**
- [ ] **Emergency exits**
- [ ] **First aid kits**
- [ ] **Automated External Defibrillators (AEDs)**
- [ ] **Restrooms**
- [ ] **Break rooms**

- [ ] **Storage areas**
- [ ] **Printers/copy machines**
- [ ] **Mailbox (if applicable)**
- [ ] **Parking (if applicable)**
  Show the new employee where you and the team typically park. Share any helpful tips or tricks, such as the best times to arrive, areas that tend to fill up quickly, and alternative parking options if needed.

Timekeeping, Leave, & Pay

- [ ] **Discuss the employee's work schedule, including start and stop times**
- [ ] **Review the applicable timekeeping system (i.e., Aggietime, Mytime, or Facilities Timekeeping) and expectations you have set**
  Introduce them to the e-learning for the timekeeping system in Learn Blue.

  Discuss the process for notifying you and the team of leave as well as how to submit requests for time off or leave (if applicable):
  - *Vacation time*
  - *Sick time*
- [ ] **Overtime (See Policy 3203)**
  If the employee is non-exempt or hourly, discuss overtime requirements or expectations. Make sure they understand the procedures for logging overtime hours and receiving approval, as well as how they will be compensated if they work overtime.

  If the employee is exempt explain the fact that if they work over 40 hours per week they do not receive additional compensation. Discuss your preferences on balancing out peak vs. lighter work weeks/periods.
- [ ] **Communicate your expectations around attendance and punctuality (See Policy 3205)**
  Make sure the employee understands the importance of being on time, and the process for reporting absences or tardiness.
  - *Discuss lunch and break period procedures.*
  - *Show them where to view University Holidays: usu.edu/calendar/holidays*
    - *Are there exceptions for your team? Would the employee ever be expected to work during any of these holidays (essential personnel i.e., USU Police, IT, Facilities)?*
  - *Discuss flexible schedule options (if applicable).*
- [ ] **Discuss the employee's starting pay and how it may change over time**
  Explain that future pay adjustments will depend on factors like their qualifications, experience, performance, budget considerations, and internal equity, all within the university's salary structure.
- [ ] **Discuss the frequency the employee's paycheck will be delivered and explain their responsibility to ensure its delivery, especially for hourly employees**

> ***Example Script***
>
> *"You'll be paid twice per month. For work performed from the 1st-15th, you'll receive your paycheck on the 25th of that month. For work performed from the 16th through the end of the month, you'll be paid on the 10th of the following month. To view your paycheck, visit my.usu.edu, log in, click "Common Tools," then "Banner Dashboard." (continued on the next page)*

> *From there, in the 'Employee' section, you can select "Employee Dashboard" and click on the blue text listing the date of your last paystub to view your pay amounts and any deductions.*
>
> *If you ever notice a discrepancy in your paycheck, please let me know right away so we can resolve it as quickly as possible. You can also contact HR or Payroll directly, and they'll assist in investigating and correcting any issues."*

Safety Review

"Supervisors are expected to understand and communicate the health and safety concerns in their respective areas, provide appropriate training to their employees, promote a safe work environment, and encourage the proper use of any required safety equipment."

- ☐ **Review general safety rules**
  Visit research.usu.edu/ehs/health-safety and usu.edu/dps/emergency.
- ☐ **Inform the employee of campus closure procedures (See Policy 2400)**
  During severe weather or emergencies, the university may close. Full-time employees will receive administrative leave for scheduled hours, but hourly employees will only be paid if they are required to work during the closure.
- ☐ **Explain job or equipment hazards**
- ☐ **Discuss the Departmental Emergency Response Plan in ServiceNow (If applicable)**
- ☐ **Describe any lockout-tagout procedures and hazard communications training (If applicable)**
- ☐ **Explain storage and disposal of solvents, hazardous chemicals and waste procedures (If applicable)**
- ☐ **Show the employee how and where to access eye protection, hearing protection, and other protective equipment requirements (If applicable)**
- ☐ **Explain proper lifting techniques & required safety clothing and footwear (If applicable)**

Assist with Workstation Set-up

- ☐ **Computer/device set-up**
  A supervisor, onboarding mentor, or IT can do this with the new employee.
- ☐ **Furniture (if applicable)**
  Desk/workstation set-up, chair, shelves, drawers.
- ☐ **Phone and Phone Number (if applicable)**

> ***Example Script***
>
> *"Always answer calls professionally, using a courteous tone and appropriate greetings (e.g., "Good morning, [Dept. Name], this is [Your Name]").*"
>
> *"Work phones should primarily be used for business purposes. Personal calls should be kept to a minimum and made during breaks, if necessary."*
>
> *"Set up a professional voicemail message, and return calls promptly."*
>
> *"Dialing 91 before entering the phone number (including area code) is required before calling individuals/organizations outside of USU."*

- [ ] **Keys/proximity cards**
  Logan: The Department Access Coordinator and/or department head will need to submit a request to Facilities for all physical keys and proximity cards. Once approved, instruct the employee to visit the Logan Key Office: 1295 E 700 N, Logan, Room 104 to retrieve their keys.
  Statewide: Check with your Director of Students (DOS) on the process for your compus/building.

- [ ] **Office supplies**
  Explain how to access existing inventory (if applicable), and explain the process for requesting and purchasing additional materials.
  Examples: pens, sticky notes, scissors, tape, stapler, notepads.

- [ ] **Order business cards (optional)**
  Business cards can only be created by Aggie Print or University Marketing and Communications. Please visit this website to order and find more information: usu.edu/brand/standards/stationery/business-cards

- [ ] **Parking pass (if applicable)**
  Provide or assign time for the employee to contact parking with questions and acquiring a permit.

Assist with Software and Programs Access

- [ ] **Microsoft Office installed (if applicable)**

- [ ] **Outlook set-up (if applicable)**
  Discuss the difference between the desktop app and the online version (owa.usu.edu).
  Grant access/provide password to any additional team email accounts.

- [ ] **Calendars access and setup**

- [ ] **Review ServiceNow**
  Help employee login to ServiceNow and show them the requests they will use the most frequently.

- [ ] **Grant access to personal, team, and project Box files**

- [ ] **Review and set up access to team communication or chat software (Slack, teams, etc.)**

- [ ] **Review IT support contact(s) and process for requesting support**

- [ ] **Set up access to printers**
  IT support contact may be needed to complete this task.

- [ ] **Install other applicable software**

- [ ] **Access to other programs**

- [ ] **Direct employee to set-up email signature**
  usu.edu/brand/standards/stationery/email-signature

- [ ] **Access to Canvas (if applicable)**

By signing this attestation, I, _____, acknowledge that I have provided the information contained in this checklist and guidance to support _____ during their onboarding process.

Employee Name

_____ _____

Employee Signature Date

_____ _____

Supervisor Signature Date

Take a photo of / scan **this checklist OR the supervisor checklist and upload in Learn Blue, or email it to training@usu.edu.*