**Overview of Onboarding Checklists for Supervisors and New Employees**

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| **Completion Timeframe** | **Supervisor** | **Employee** |
| Before Start Date | 1st Checklist: Set up workspace | 1st Checklist: Pre-hire activities.Supervisor sends, via email, a “warm welcome letter” to the employee prior to start date. *See sample in materials.*   |
| 2nd Checklist: Training Plan |
| 3rd Checklist: Prepare team members |
| 4th Checklist: Create a 1st week plan |
| Day One | 5th Checklist: Day one activities | 2nd Checklist: Day one activities.Supervisor to provide to employee day one. |
| By End of 1st Week | 6th Checklist: Week one activities | 3rd Checklist: Week one activitiesSupervisor to provide to employee day two. |
| By End of 2nd Week | 7th Checklist: Week two activities | 4th Checklist: Week two activitiesSupervisor to provide to employee at beginning of employee’s second week of employment. |
| By End of 6 Months | 8th Checklist: By end of 6th month activities |  |

Human Resources provides both supervisor and employee checklists to the supervisor. Supervisors will coordinate the distribution of the employee checklists to their new employee.

There is no expectation that the supervisor will return completed checklists to the Human Resources Office, as they are only intended to serve as a helpful reminder of what needs to happen at different points pre-hire through the employee’s first six months.

**The following pages provide the checklists identified above.**

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| **NEW EMPLOYEEE ONBOARDING****EMPLOYEE’S cHECKLIST #1 ACTIVITIES TO COMPLETE BEFORE YOUR START DATE** |

This checklist is intended to be a helpful reminder of important tasks to complete before your start date. You are not expected to submit completed checklists to Human Resources; you are encouraged to share/discuss with your supervisor.

[ ]  If your hiring letter requires your signature, print and sign the letter, and return to HR@ewu.edu.

[ ]  Complete [immunization requirements](https://inside.ewu.edu/bewell/immunization/) [[1]](#endnote-1) for MMR or obtain a medical or religious exemption.

[ ]  Review I-9 instructions, and identify what original personal identification you will bring and show to HR on first day.

[ ]  Complete all of the new hire personnel forms sent to you by HR; make sure you bring with you on your first day if you don’t send the paperwork back before you start.

[ ]  Submit your photo for your MyEagleCard. See the instructions that came with your welcome letter.

[ ]  Return new hire paperwork to HR:

* Bring the paperwork with you on your first day, and return it to HR

OR

* Send the paperwork back in advance:

Email: hr@ewu.edu

Fax: (509)359-2874

[ ]  Plan where you'll park on your first day (review the [Welcome to Eastern](https://in.ewu.edu/hr/wp-content/uploads/sites/40/2022/11/OnboardingWelcomeToEasternFlyer2022.pdf) [[2]](#endnote-2) flyer for suggestions).

[ ]  Your supervisor should reach out to confirm first day details: start time, where to go, expected dress, lunch plans. Feel free to reach out yourself to confirm details!

[ ]  As time permits, check out our [Onboarding](https://inside.ewu.edu/hr/onboarding/) webpage, [[3]](#endnote-3) especially the section for New Hire Forms.

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| **NEW EMPLOYEEE *ONBOARDING*****EMPLOYEE’S cHECKLIST #2 FIRST day activities** |

This checklist is intended to be a helpful reminder of important tasks to complete on your first day of work. You are not expected to submit completed checklists to Human Resources; you are encouraged to share/discuss with your supervisor.

**Get off to a good start by ensuring these tasks are completed on your first day!**

[ ]  Bring a copy of your hiring letter with you (you'll need it for several activities mentioned below).

[ ]  Stop by Human Resources (314 Showalter) to deliver new hire paperwork and complete the

I-9. You are encouraged to complete a [Direct Deposit Form](https://in.ewu.edu/financialservices/wp-content/uploads/sites/44/2018/01/Direct-Deposit-Form.pdf) [[4]](#endnote-4) for your paycheck, and if your position will involve travel reimbursements, you are encouraged to complete a [Direct Deposit for Travel Reimbursement Form](https://inside.ewu.edu/hr/wp-content/uploads/sites/40/2022/12/Vendor_Direct_Deposit_Agreement_Form.pdf) [[5]](#endnote-5)

[ ]  Discuss with supervisor good days/times to schedule your meeting with Benefits.

[ ]  Watch for an email meeting request from Benefits to schedule your benefits briefing. Call (509)359-2488 if you need to contact them.

[ ]  To activate your email, go to the [new account activation webpage](https://support.ewu.edu/support/solutions/articles/10000042872-new-account-activation) [[6]](#endnote-6) or call IT Help Desk at (509) 359-2247 and request your temporary password for your computer (you'll need your ID number, which is in your hiring letter).

[ ]  Coordinate with your supervisor to establish access to your office computer, email, and calendar account; set up your voicemail.

[ ]  Check with supervisor to see if an appointment has been made to pick up your EagleCard and keys; if not, go ahead and make these appointments online at

 [Access Control Appointment Form](https://inside.ewu.edu/facilities/access-control-appointment-form/) [[7]](#endnote-7)

[ ]  Pick up your Eagle Card and keys at the Eagle Card Business Office/Access Control; you will need a copy of your hiring letter and ID.

[ ]  Take notes during any training on your new job.

[ ]  Throughout the day, make a list of any questions you have.

[ ]  Don’t forget to take required breaks, including a lunch break.

[ ]  Take time before the end of the day to reflect on the day, list questions you have, and be ready for an end-of-day meeting with your supervisor.

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| **NEW EMPLOYEEE *ONBOARDING*****EMPLOYEE’S cHECKLIST #3 ESSENTIAL first week information** |

This checklist is intended to identify information you should acquire by the end of your first week. Your supervisor will take the lead in providing the needed information and instruction, so this checklist allows you to track when this essential knowledge has been reviewed with you. You are not expected to submit completed checklists to Human Resources.

[ ]  Review of job description.

[ ]  Review of position’s Performance Expectations (applies to classified staff).

[ ]  Verify your work schedule and expectations.

[ ]  Learn expectations about overtime (if applicable).

[ ]  Learn the procedure for when you are ill.

[ ]  Learn how to ask for time off (vacation, medical appointments, personal holiday).

[ ]  Understand your supervisor’s expectations for maintaining your Outlook calendar.

[ ]  Learn about the department calendar (if any), and future events/meetings.

[ ]  Understand your supervisor's expectations for email usage, returning phone calls, checking your voicemail.

[ ]  Learn how to access your timesheet through EagleNET.

[ ]  Learn about the university and supervisor’s expectations regarding confidentiality of records, and FERPA if your position involves student records or other confidential information.

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| **NEW EMPLOYEEE *ONBOARDING*****EMPLOYEE’S cHECKLIST #4 essential second week information** |

This checklist is intended to be a helpful reminder of important tasks and knowledge to acquire during your second week. You are not expected to submit completed checklists to Human Resources; you are encouraged to share/discuss with your supervisor.

**Check off these items as they are completed. Complete by the end of the second week – and congratulate yourself on completing tasks and acquiring fundamental information designed to help you be successful!**

[ ]  Learn about the schedule for performance evaluations, formal and informal.

[ ]  Learn the applicable procedures (if applicable) for probationary employment, and/or cyclic employment.

[ ]  Review the department safety checklist, or at a minimum, learn where to meet in an emergency.

[ ]  Learn the emergency notification procedures and who will call (department’s “phone tree”).

[ ]  Sign up for [EWU Alerts](https://inside.ewu.edu/police/ewu-alerts/) [[8]](#endnote-8)

[ ]  Learn the university’s inclement weather procedures: [EWU 601-02: Suspended Operations](https://inside.ewu.edu/policies/knowledge-base/ewu-601-02-suspended-operations-emergency-closure/) [[9]](#endnote-9)

[ ]  Find out whether or not your position is considered essential during suspended operations.

[ ]  Learn your supervisor’s safety expectations; learn what to do if there are injuries on the job, or “near misses.”

[ ]  Learn the campus mail procedures.

[ ]  Attend HR orientation.

[ ]  Learn where to find the CBA (if applicable to your position): [Unions & Contracts](https://inside.ewu.edu/hr/unions-and-contracts/) [[10]](#endnote-10)

[ ]  Attend your union orientation (if applicable to your position).

**If any of these topics are not covered by your supervisor by the end of your second week, reach out to your supervisor to discuss and schedule when training on remaining topics will be provided.**

1. <https://inside.ewu.edu/bewell/immunization/> [↑](#endnote-ref-1)
2. <https://in.ewu.edu/hr/wp-content/uploads/sites/40/2022/11/OnboardingWelcomeToEasternFlyer2022.pdf> [↑](#endnote-ref-2)
3. <https://inside.ewu.edu/hr/onboarding/> [↑](#endnote-ref-3)
4. <https://in.ewu.edu/financialservices/wp-content/uploads/sites/44/2018/01/Direct-Deposit-Form.pdf> [↑](#endnote-ref-4)
5. <https://inside.ewu.edu/hr/wp-content/uploads/sites/40/2022/12/Vendor_Direct_Deposit_Agreement_Form.pdf> [↑](#endnote-ref-5)
6. <https://support.ewu.edu/support/solutions/articles/10000042872-new-account-activation> [↑](#endnote-ref-6)
7. <https://inside.ewu.edu/facilities/access-control-appointment-form/> [↑](#endnote-ref-7)
8. <https://inside.ewu.edu/police/ewu-alerts/> [↑](#endnote-ref-8)
9. <https://inside.ewu.edu/policies/knowledge-base/ewu-601-02-suspended-operations-emergency-closure/> [↑](#endnote-ref-9)
10. <https://inside.ewu.edu/hr/unions-and-contracts/> [↑](#endnote-ref-10)