**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 activities  Supervisor to provide to employee day two. |
| By End of 2nd Week | 7th Checklist: Week two activities | 4th Checklist: Week two activities  Supervisor 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 EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #1 SET UP THE EMPLOYEE’S WORKSPACE** |

This check list is intended to be a helpful reminder of essential tasks to complete PRIOR to your new employee’s start date. You are not expected to submit completed Checklists to your manager or to Human Resources.

**Thank you for helping your new employee get off to a good start by ensuring these tasks are completed!**

Building and office access - what's needed? Key(s), EagleCard? Complete the [Prox Card Form](https://inside.ewu.edu/facilities/access-control-prox-auth-form/)[[1]](#endnote-1) and [Key Form](https://inside.ewu.edu/facilities/access-control-key-auth-form/)[[2]](#endnote-2) and send to [accesscontrol@ewu.edu](mailto:accesscontrol@ewu.edu) to request appointment for employee to pick up key and card.

Order business cards, name plate, name badge (if needed).

Ensure workspace is clean and stocked with basic supplies.

Include a welcome sign on their door or workstation. [Welcome Sign Templates](https://inside.ewu.edu/hr/welcome-sign-templates/)[[3]](#endnote-3)

Arrange for set up of computer, printer access, telephone; [IT Help Desk](https://support.ewu.edu/support/home) .[[4]](#endnote-4)

Arrange for systems access setup: shared drives, networks, SSO.

Banner access - complete and submit needed forms

* **For Banner Finance and HR/Payroll:** see [How do I get access to Banner Finance and HR/Payroll?](https://support.ewu.edu/support/solutions/articles/10000056775-how-do-i-get-access-to-banner-finance-and-hr-payroll-) *[[5]](#endnote-5)*
* **For Banner Student:** see [How do I get access to Banner Student?](https://support.ewu.edu/support/solutions/articles/10000013520-how-do-i-get-access-to-banner-student-) [[6]](#endnote-6)

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #2 IDENTIFY NEEDED TRAINING** |

This Checklist is intended to be a helpful reminder of training that your new employee may need to complete. Identify the needed training prior to your new employee’s start date. You are not expected to submit completed Checklists to your manager or to Human Resources.

Regarding the training topics, not all of them will apply to all employees. Start by checking those that do apply to your new employee.

**Thank you for helping your new employee get off to a good start by ensuring needed training is scheduled!**

All training information and links can be found at[Professional Development & Training Resources](https://inside.ewu.edu/hr/training-resources/) .[[7]](#endnote-7)

Timesheet / Web Time Entry

DEI, Title IX and Hazing Trainings – **Required for all employees**

* Employees can participate in synchronous workshops in person or via Zoom, or employees can complete them asynchronously online.

Banner has various trainings depending on the employee’s responsibilities and role.

Budget, cash handling, and/or P-card. Setting up a new P-card holder.

Travel expense management (Concur)

Supervisor training and tools (if a supervisor)

* Onboarding New Employees
* Student Employee Supervisor Training
* Essential Training for Supervisors program
* Supervisor tools
* Bullying prevention
* Contract interpretation
* Hiring and Onboarding
* Corrective action/discipline

Non-student hourly employment: [EWU 407-01: Temporary Employment](https://inside.ewu.edu/policies/knowledge-base/ewu-407-01-temporary-employment/)  [[8]](#endnote-8)

Records management

Specialized Environmental Health & Safety Training

Security awareness training

Labor relations, union contracts, corrective action, discipline, just cause: Supervisor Tools

Other(s)

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #3 PREPARE TEAM MEMBERS** |

This Checklist is intended to be a helpful reminder of tasks to complete to help ensure your new employee will be able to successfully integrate into the department team. All of these items should be completed prior to your new employee’s start date (not all of them will apply to all departments and all new employees). You are not expected to submit completed checklists to your manager or to Human Resources.

**Thank you for helping your new employee get off to a good start by preparing your team for their arrival!**

Communicate with the team about the new employee’s arrival.

Describe the new employee’s role and responsibilities for the current team.

Update internal telephone lists as needed, including emergency phone tree.

Remind team to update email groups.

Communicate with other university constituents.

If you won't be available on your employee’s first day, select a delegate to assist them on day one and identify specific responsibilities this delegate will have .

Identify other co-workers who can assist with training or serve as a resource.

Identify a co-worker who can assist with basic tasks, such as picking up the EagleCard and keys.

Set up appointments with persons your new employee should meet.

Other

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #4 FIRST WEEK PLAN** |

This checklist is intended to be a helpful reminder of essential planning to help ensure your new employee’s success. This planning should be completed prior to your new employee’s start date. You are not expected to submit completed checklists to your manager or to Human Resources.

**Thank you for helping your new employee get off to a good start by ensuring you have a solid first-week plan in place before their start date!**

Set aside time in your calendar to make sure you have plenty of availability throughout their first week.

Determine when your employee will stop by HR on their first day.

Plan for balanced use of time: training, time with others, time to read manuals, work time, time for questions, breaks.

Plan one-on-one and/or small group meetings.

Schedule regular meetings with the employee; daily during week one.

Schedule specific departmental training.

Plan time alone so they can review information.

Identify tasks that can be started right away.

Determine days and times for co-workers to assist.

Schedule training that will be provided by parties outside of the department.

Determine good time(s) for employee to attend Benefits orientation.

Plan touch-base meetings at the end of each day during their first week.

If employee will be authorized to work remotely or to telework, a [form](https://inside.ewu.edu/hr/forms/) [[9]](#endnote-9) must be completed and approved prior to first remote or telework start date: [EWU 104-09: Teleworking](https://inside.ewu.edu/policies/knowledge-base/ewu-401-09-teleworking/); [[10]](#endnote-10) [EWU 401-10: Remote Work](https://inside.ewu.edu/policies/knowledge-base/ewu-401-10-remote-work/). [[11]](#endnote-11)

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #5 Supervisor activities for first day** |

This checklist is intended to be a helpful reminder of essential tasks to complete. Note that not all of these tasks are relevant to all employees. All applicable items should be planned prior to your new employee’s start date, so you can effectively complete the activities on the employee’s first day. You are not expected to submit completed checklists to your manager or to Human Resources.

**These are typical “day one” activities to help your new employee settle in. Make a note to indicate who will assist the new employee with any activities you delegate to others to complete, and scheduling information.**

Review plans with the employee for their first day - activities and training.

Introduce co-workers; show location of files, equipment, supplies.

Explain who to contact with questions when supervisor is unavailable.

Explain plans for regular one-on-one meetings (daily at first through first week).

Confirm lunch options for their first day.

Review job description (and performance expectations, if applicable).

Classified positions – review performance expectations.

Review plans for training – job duties, access and use of systems, Banner, etc.

Review confidentiality of records and information; [FERPA](https://inside.ewu.edu/records-and-registration/ferpa/) [[12]](#endnote-12).

Review work schedule, break times, appropriate attire.

Provide initial job training - assign task(s) and allow time for task work/completion.

Ensure employee has activated their EWU account: [New Account Activation](https://support.ewu.edu/support/solutions/articles/10000042872-new-account-activation) [[13]](#endnote-13)

Review employee’s day one Checklist; assist with activities as needed.

Meet at the end of the day - how did their first day go? Questions?

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #6 Supervisor activities for first week** |

This checklist is intended to be a helpful reminder of essential training and instruction you should provide by the end of the employee’s first week. You are not expected to submit completed checklists to your manager or to HR.

**Thank you for helping your new employee get off to a good start by ensuring this training and information is provided!**

Explain the [EWU Mission and Vision](https://www.ewu.edu/about/fast-facts/)  [[14]](#endnote-14)

Explain the [EWU Strategic Plan](https://inside.ewu.edu/strategic-planning/)  [[15]](#endnote-15)

[Organizational Charts](https://inside.ewu.edu/hr/org-charts/) [[16]](#endnote-16)

Take the employee on a campus tour; introduce to other university partners and key offices.

Review expectations for calendar usage; review dept. calendar, identify upcoming meetings or events.

Review appropriate use of computer, email, expectations, ethical concerns: [EWU Policy 901-02](https://inside.ewu.edu/policies/knowledge-base/ewu-901-02-appropriate-use-of-university-resources/?seq_no=2)  [[17]](#endnote-17)

Review telephone use expectations, voicemail.

Review  [timesheet](https://inside.ewu.edu/hr/timesheet-information/)  [[18]](#endnote-18) expectations and procedures.

Review department overtime and comp time procedures (if applicable).

Review how to request time off and expectations for scheduling vacation, personal holiday, personal leave.

Review expectations for sick leave usage; scheduling appointments; calling in sick procedures.

If probationary and/or cyclic, review the applicable procedures.

Review the timing of performance evaluations.

Continue job training - assign tasks, allow time for working on tasks.

Ensure employee creates and uses the university email signature [template](https://www.ewu.edu/university-marketing-communications/logos-standards/) [[19]](#endnote-19) .

Meet at the end of each day during the first week - how did their day go?

Friday: review plans for their 2nd week.

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #7 Supervisor activities for SECOND week** |

This checklist is intended to be a helpful reminder of essential training and instruction you should provide by the end of the employee’s second week. You are not expected to submit completed checklists to your manager or to Human Resources.

**Thank you for helping your new employee get off to a good start by ensuring these tasks are completed!**

Adjust one-on-one meeting schedule as appropriate.

If position is represented by PSE, WFSE or UFE, show where to find CBA: [Unions and Contracts](https://inside.ewu.edu/hr/unions-and-contracts/) [[20]](#endnote-20) Ensure they attend union orientation.

Review schedule for required training (Banner, cash handling, Title IX, DEI, etc.).

Explain work hazards (EFA), safety, how to report injuries and “near misses.”

Review emergency notification procedures; where to go in case of emergency at work.

Encourage them to sign up for [EWU Alerts](https://inside.ewu.edu/police/ewu-alerts/) [[21]](#endnote-21); review weather procedures and department expectations.

Review suspended operations, expectations for the employee, and whether the position is "essential."

Explain campus mail procedures.

Continue job training - assign tasks, allow time for working on tasks.

Prepare for end of 2nd week review:

* Identify accomplishments
* Areas requiring focus/training,
* Specific training/activities scheduled for next 2 weeks.

Conduct the end of 2nd week review; give feedback and answer questions.

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| **NEW EMPLOYEE ONBOARDING**  **sUPERVISOR’S cHECKLIST #8 Supervisor activities WITHIN THE FIRST 6 MONTHS** |

This checklist is intended to be a helpful reminder of essential tasks to complete during the employee’s first six months. You are not expected to submit completed checklists to your manager or to Human Resources.

**Thank you for helping your new employee become successful in their new position by ensuring these tasks are completed!**

Ensure employee has completed all required trainings.

Adjust meeting frequency depending on employee progress; for example:

Week 1: meet daily

Weeks 2 – 4: 2 or 3 times weekly

Months 2 – 4: once each week

Months 5 – 6: every other week

Schedule meeting toward end of 4th week for overall review and coaching.

For classified staff, complete the 3-month evaluation form.

For exempt staff, provide performance overview and feedback towards the end of their 3rd month.

Identify additional training needed after the 3-month review; schedule the training.

Within the first 4 months, ensure employee is exposed to all of the position’s significant responsibilities.

Consult with HR regarding performance issues at any point and as needed.

For classified staff, complete 5-month evaluation form.

For exempt staff, provide a 6-month performance overview and feedback.

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| **NEW EMPLOYEE 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](mailto:HR@ewu.edu).

Complete [immunization requirements](https://inside.ewu.edu/bewell/immunization/) [[22]](#endnote-22) 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](mailto: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) [[23]](#endnote-23) 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, [[24]](#endnote-24) especially the section for New Hire Forms.

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| **NEW EMPLOYEE *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) [[25]](#endnote-25) 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) [[26]](#endnote-26)

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) [[27]](#endnote-27) 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/) [[28]](#endnote-28)

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 EMPLOYEE *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 EMPLOYEE *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/) [[29]](#endnote-29)

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/) [[30]](#endnote-30)

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/) [[31]](#endnote-31)

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/facilities/access-control-prox-auth-form/> [↑](#endnote-ref-1)
2. <https://inside.ewu.edu/facilities/access-control-key-auth-form/> [↑](#endnote-ref-2)
3. [*https://inside.ewu.edu/hr/welcome-sign-templates/*](https://inside.ewu.edu/hr/welcome-sign-templates/) [↑](#endnote-ref-3)
4. [*https://support.ewu.edu/support/home*](https://support.ewu.edu/support/home) [↑](#endnote-ref-4)
5. [*https://support.ewu.edu/support/solutions/articles/10000056775-how-do-i-get-access-to-banner-finance-and-hr-payroll-*](https://support.ewu.edu/support/solutions/articles/10000056775-how-do-i-get-access-to-banner-finance-and-hr-payroll-) [↑](#endnote-ref-5)
6. [*https://support.ewu.edu/support/solutions/articles/10000013520-how-do-i-get-access-to-banner-student-*](https://support.ewu.edu/support/solutions/articles/10000013520-how-do-i-get-access-to-banner-student-) [↑](#endnote-ref-6)
7. <https://inside.ewu.edu/hr/training-resources/> [↑](#endnote-ref-7)
8. <https://inside.ewu.edu/policies/knowledge-base/ewu-407-01-temporary-employment/> [↑](#endnote-ref-8)
9. <https://inside.ewu.edu/hr/forms/> [↑](#endnote-ref-9)
10. <https://inside.ewu.edu/policies/knowledge-base/ewu-401-09-teleworking/> [↑](#endnote-ref-10)
11. <https://inside.ewu.edu/policies/knowledge-base/ewu-401-10-remote-work/> [↑](#endnote-ref-11)
12. <https://inside.ewu.edu/records-and-registration/ferpa/> [↑](#endnote-ref-12)
13. <https://support.ewu.edu/support/solutions/articles/10000042872-new-account-activation> [↑](#endnote-ref-13)
14. <https://www.ewu.edu/about/fast-facts/> [↑](#endnote-ref-14)
15. <https://inside.ewu.edu/strategic-planning/> [↑](#endnote-ref-15)
16. <https://inside.ewu.edu/hr/org-charts/> [↑](#endnote-ref-16)
17. <https://inside.ewu.edu/policies/knowledge-base/ewu-901-02-appropriate-use-of-university-resources/?seq_no=2> [↑](#endnote-ref-17)
18. <https://inside.ewu.edu/hr/timesheet-information/> [↑](#endnote-ref-18)
19. <https://www.ewu.edu/university-marketing-communications/logos-standards/> [↑](#endnote-ref-19)
20. <https://inside.ewu.edu/hr/unions-and-contracts/> [↑](#endnote-ref-20)
21. <https://inside.ewu.edu/police/ewu-alerts/> [↑](#endnote-ref-21)
22. <https://inside.ewu.edu/bewell/immunization/> [↑](#endnote-ref-22)
23. <https://in.ewu.edu/hr/wp-content/uploads/sites/40/2022/11/OnboardingWelcomeToEasternFlyer2022.pdf> [↑](#endnote-ref-23)
24. <https://inside.ewu.edu/hr/onboarding/> [↑](#endnote-ref-24)
25. <https://in.ewu.edu/financialservices/wp-content/uploads/sites/44/2018/01/Direct-Deposit-Form.pdf> [↑](#endnote-ref-25)
26. <https://inside.ewu.edu/hr/wp-content/uploads/sites/40/2022/12/Vendor_Direct_Deposit_Agreement_Form.pdf> [↑](#endnote-ref-26)
27. <https://support.ewu.edu/support/solutions/articles/10000042872-new-account-activation> [↑](#endnote-ref-27)
28. <https://inside.ewu.edu/facilities/access-control-appointment-form/> [↑](#endnote-ref-28)
29. <https://inside.ewu.edu/police/ewu-alerts/> [↑](#endnote-ref-29)
30. <https://inside.ewu.edu/policies/knowledge-base/ewu-601-02-suspended-operations-emergency-closure/> [↑](#endnote-ref-30)
31. <https://inside.ewu.edu/hr/unions-and-contracts/> [↑](#endnote-ref-31)