

- **Prior to Start Date**
  - Email HR paperwork & campus map (parking)
  - Email Pre-boarding Survey
  - Inform coworkers of new hire's role/position, start date, etc.
  - B.E.S.T. Onboarding Ambassador reach out & introductions
  - Confirm start date, time, dress code, parking
  - Prepare welcome kit (Welcome letter, job description, keys, business cards, name badge, pens, note pad, business card holder, Maryville red shirt voucher)
  - Inform IT
  - Have a clean and equipped work area/office (computer, phone, basic supplies)
  - Access or instructions to access department calendar
  - Prepare first week assignments/training
  - Set up tours
  - Set up office tour
  - Assign mandatory trainings
  - Email a tutorial for setting up voicemail and email signature (assist if needed on first day)
- **1<sup>st</sup> Day**
  - B.E.S.T. Onboarding Ambassador meet new hire in lobby or agreed upon location (walk with them to their office)
  - Office tour & introductions
  - Emergency evacuation route & safety shelter
  - Meet with HR
    - W-4
    - I9
    - Salary Reduction Agreement
    - Benefits
    - OSHA
  - Welcome kit delivered to office
  - Welcome treat
  - Campus tour & introductions (weather permitting)
  - Lunch with Supervisor/ Direct Report
  - Explain first week's schedule
  - Overview the department's organizational structure, purpose, and goals
    - How the new hire fits
    - Job description, expectations, work hours (overtime, flex, etc.)
    - Time off policies (vacation, sick, holiday, etc.)
  - Explain how to:
    - order supplies
    - opt-in emails for campus news and events
    - reply to emails (**DO NOT REPLY ALL**)
    - Enter hours (approve time cards if supervisor) in ADP
    - Use systems (Colleague, ImageNow, Salesforce, etc.)
- **1<sup>st</sup> Week**
  - Explain how to:
    - use ADP
      - Request time off/check balance
      - Find paystub and tax information
      - Performance review

- Enroll in benefits
  - Utilize LifeMart
- Give new hire doable assignments/ introductions to core job duties
- B.E.S.T. Onboarding Ambassador lunch/debriefing
- Touch base with new hire daily (doesn't have to long and formal)
  - Progress on assignments
  - Computer and systems functions
  - Answer questions
- Give more information about the company, department, culture, initiatives, strategic plan
- Explain the probationary period( structure and expectations), annual performance review, and goal-setting
- **1<sup>st</sup> 30 Days (Month)**
  - Review first few weeks with new hire and B.E.S.T. Onboarding Ambassador
  - One on one meeting
  - Provide feedback and be available for questions
  - Discuss professional development goals
  - Assign additional assignments
  - Ensure required trainings are complete
  - Ensure necessary HR and Payroll forms and enrollments are complete
  - Assign Diversity Trainings and Inclusion workshops
- **1<sup>st</sup> 60 Days (2 Months)**
  - Conduct performance review
  - Discuss professional development and performance goals
- **1<sup>st</sup> 90 Days (3 Months)**
  - Informal 90 day check in
  - Meet with new hire and B.E.S.T. Onboarding Ambassador (end of formal B.E.S.T. Onboarding Ambassador program)
    - Solicit feedback on B.E.S.T. Onboarding Ambassador program
      - Was it helpful
      - What would you change/add
- **1<sup>st</sup> 180 Days (6 Months)**
  - Performance review
  - Discuss having skills to perform assigned duties and professional development
  - Solicit feedback on onboarding process (online survey)
  - Check goal progression
  - Introduce new hire to the Performance Evaluation Competencies
- **1<sup>st</sup> Year**
  - Performance review
  - Discuss new hire's 1<sup>st</sup> year experience
    - Expectations
      - Did duties/job meet them?
      - Surprises?
    - Have the skills to perform assigned duties
    - Suggestions (What is needed)
  - Discuss year ahead
  - Solicit feedback on the onboarding program
- **Throughout the Process**
  - Inform new hire that there are opportunities to participate on campus (get involved)
  - Invite new hire to campus events
  - Pass along development learning opportunities
  - Provide feedback

## Checklist

○ **Prior to Start Date**

○ **HR**

- Email HR paperwork & campus map (parking)
- Email Pre-boarding survey
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

○ **Your area**

- Confirm start date, time, parking, dress code
- Determine Work schedules/ hours
- Assign office/desk/work station
  - Clean and equip with basic supplies (**business card holder, pens, note pad, sticky notes, etc.**)
- Order
 

key(s)		Nameplate
Business Cards		Name badge
- Other basic supplies
- Inform coworkers of new hire’s role/position, start date, etc.
- Mailbox (assign, label if necessary)
- Prepare welcome kit
- Prepare first week assignments/training
- Set up office tour
- Add employee’s name to distribution list
- Assign mandatory trainings
- Email a tutorial for setting up voicemail and email signature (assist if needed on 1<sup>st</sup> day)
- Access or instructions to access department calendar (Viewing and editing rights)
- Other: \_\_\_\_\_

- Other: \_\_\_\_\_

- **Contact IT for the following:**

- Set-up, install, configuration and/or clearing of:

- Telephone extension assigned
- Computer/Laptop (ordered)
- iPad
- Necessary permissions (Network access, drives, etc.)
- Peripherals (keyboard/mouse, monitor(s), docking station, scanner)
- Email setup
- Cell phone
- Other Equipment
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

- **Reach out to the Onboarding team**

- Have B.E.S.T. Onboarding Ambassador assigned
- Provide new hire information (name, mini bio, start date, email, office location, etc.)
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

- **Contact Finance office for the following**

- Budget authority permissions
- Credit card
- Update the Image Now AP Queue User List
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

- **1<sup>st</sup> Day**

- Welcome treat
- Meet B.E.S.T. Onboarding Ambassador
- Deliver Welcome kit to office/workstation

- Tours and introductions
  - Office
  - Emergency evacuation route & safety shelter
  - Campus (weather permitting)
- Lunch with Supervisor/ Direct Report
- Explain first week's schedule
- Company/Department/Position Overview
- Encourage open dialogue
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- **1<sup>st</sup> Week**
  - Explanations
    - Portals (Maryville's, ADP, Salesforce, etc.)
    - Systems (computer, telephone/voicemail, email)
    - Supplies
    - How to stay informed
    - Culture
    - Strategic plan
    - Mission | Core Values | Vision
  - Assign duties
  - New hire has lunch with B.E.S.T. Onboarding Ambassador
  - Touch base with new hire daily (doesn't have to long and formal)
  - Explain the probationary period( structure and expectations), annual performance review, and goal-setting
  - Inform new hire that there are opportunities to get involved on campus
  - Other: \_\_\_\_\_
  - Other: \_\_\_\_\_

○ **1<sup>st</sup> 30 Days (Month)**

- Review first week with new hire and B.E.S.T. Onboarding Ambassador
- One on one meeting
- Provide feedback and be available for questions
- Discuss professional development goals
- Assign additional assignments
- Ensure required trainings are complete
- Ensure necessary HR and Payroll forms and enrollments are complete
- Assign Diversity Training and Inclusion workshops

○ Other: \_\_\_\_\_

○ Other: \_\_\_\_\_

○ **1<sup>st</sup> 60 Days (2 Months)**

- Conduct performance review
- Discuss professional development and performance goals

○ Other: \_\_\_\_\_

○ Other: \_\_\_\_\_

○ **1<sup>st</sup> 90 Days (3 Months)**

- Informal 90 day check in
- Meet with new hire and B.E.S.T. Onboarding Ambassador (end of formal B.E.S.T. Onboarding Ambassador program)
  - Solicit feedback on B.E.S.T. Onboarding Ambassador program
    - Was it helpful
    - What would you change/ add

○ Other: \_\_\_\_\_

○ Other: \_\_\_\_\_

○ **1<sup>st</sup> 180 Days (6 Months)**

- Send New Hire Onboarding Survey (after 90 day mark)

- Performance review and SMART Goals
- Check goal progression
- Introduce new hire to the Performance Evaluation Competencies
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

○ **1<sup>st</sup> Year**

- Annual Performance review
- Discuss new hire's 1<sup>st</sup> year experience
- Discuss year ahead
- Solicit feedback on the onboarding program
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

○ **Throughout the process**

- Pass along development and learning opportunities  
Date(s) completed
  
- Invite new hire to campus events  
Date(s) completed
  
- Provide informal feedback regularly (daily, weekly, monthly)  
Date(s) completed
  
- Supervisors should schedule weekly check-ins during first 90 days
- Encourage open dialogue
- Other: \_\_\_\_\_