

## **New Hire Faculty/Staff On-boarding Checklist Manager Responsibilities**

### **Directions:**

This checklist is designed to assist with the department's orientation process. On-boarding is a long-term process that begins before an employee's start date and continues for at least 1 year of hire. This checklist is organized chronologically and helps hiring managers prepare for the arrival of new employees. Once an employee starts, he/she can work together with the hiring manager and an on-boarding peer\*. Internal transfer employees may be able to omit items that are not applicable.

Prior to a formalized offer to the candidate confirm with Human Resources that the Request for Contract or Personnel Action Form has been approved. This is especially important if your salary offer exceeds that of the approved Approval to Hire.

\*An on-boarding peer is a peer to the new employee who can assist in the on-boarding process and be a "go to" person as directed by the manager

## **Pre-Arrival HR Responsibilities**

\_\_\_\_ HR will confirm with the manager that the offer letter and new hire welcome packet has been sent to the new employee. This is triggered by the approved Request for Contract or Personnel Action Form.

## **Pre-Arrival Manager Responsibilities**

- \_\_\_\_ Print out the New Employee On-boarding Checklist, review and customize where necessary. Checklist is located at <V:\UNEDocs\HUMAN RESOURCES\OnBoarding>.
- \_\_\_\_ Confirm that the approved Request for Contract or Personnel Action Form has been sent to HR. Contact HR with any questions, ext 2283. These forms notify HR/Payroll of your new hire, the start date, and employment status so it is important to give them a minimum of 1-2 weeks for processing.
- \_\_\_\_ Call the new hire to officially welcome to UNE after confirmation of acceptance.



- \_\_\_ Provide new employee with a UNE contact person in the event of a question or issue (this could be the on-boarding peer).
- \_\_\_ Create an on-boarding schedule for the new employee. Samples are available at <V:\UNEDocs\HUMAN RESOURCES\OnBoarding>.
- \_\_\_ Assign an on-boarding peer for the new employee's first two months of employment (if applicable).
- \_\_\_ Complete the Key Request Form (<V:\UNEDocs\HUMAN RESOURCES\OnBoarding>). Complete the form and send to Carrie Bernier in Facilities ([cbernier@une.edu](mailto:cbernier@une.edu)). New employee will need to pick up key in person at the Security front desk (Facilities Management Building) to sign it out.
- \_\_\_ Complete Banner Access Form (<V:\UNEDocs\HUMAN RESOURCES\OnBoarding>) obtain approval signatures and send to Gary Laverriere ([glaverriere@une.edu](mailto:glaverriere@une.edu)) in ITS (Ellucian).
- \_\_\_ Ensure new work area is clean, organized, and stocked with necessary office supplies.
- \_\_\_ Provide a UNE welcome gift to the new hire (coffee mug, water bottle, portfolio, pen).
- \_\_\_ Send an announcement via email to the department announcing the new hire and introducing them to the staff prior to their arrival. For positions of Director level or higher you will want to contact the Communications Department for the announcement to be included in the UNE Community email. Communications such as this should be completed 1 week from their start date.
- \_\_\_ Place an order for business cards and name plate.
- \_\_\_ Business Cards – Cards can be ordered through MPX through their online system. <https://customerlogin.mpxonline.com/une>. Please note that business cards can take 4-6 weeks after final proof is approved. Business cards should be for positions of Coordinator level or higher. It is good practice to ask the employee how they would like their name displayed on the business card.
- \_\_\_ Name Plates (office sign) – Name plates for the new hire's office can be ordered by contacting Perfect Signs at [perfectsigns@maine.rr.com](mailto:perfectsigns@maine.rr.com), 264 Guinea Road, Biddeford, ME 04005-9103, 207-282-1000. It is good practice to ask the employee how they would like their name displayed on the business cards.



## **ITS and Network Access**

The UNE Network log in is provided to the manager once the **Employee Information Form** is completed by the new hire and the information is entered into Banner by HR/Payroll. The manager will be notified via email of the new employee's temporary password. The sooner this employee information form is received by HR/Payroll the sooner the new hire will have network access.

\_\_\_ If you have not received an email with the new hire's email log in information 1-2 days prior to their start date, please contact Marcie Pecroa (mpecora@une.edu) in HR.

\_\_\_ Order computer or previous computer reconditioned:

Via the ITS Portal <http://its.une.edu/it-purchasing/new-computer-requests> (if applicable) or create an IT ticket [https://portal-tools.une.edu/google\\_web\\_forms/portalwebforms/it-help-desk-self-service/](https://portal-tools.une.edu/google_web_forms/portalwebforms/it-help-desk-self-service/) to have the former computer reconditioned. New computers can take 3-4 weeks. Reconditioning an existing computer can take 5-10 days. Other computers are available during this time as a loan option.

\_\_\_ Change or create telephone extension:

Create ticket through the ITS portal with the following information: new employee's full name, building, office number, desk location, the extension of the previous person at that location, UNE email address (if set up yet), and if they will need voicemail. [https://portal-tools.une.edu/google\\_web\\_forms/portalwebforms/it-help-desk-self-service/](https://portal-tools.une.edu/google_web_forms/portalwebforms/it-help-desk-self-service/)

\_\_\_ ITS New Hire Training:

Create ticket through ITS portal to request ITS New Hire Training. Please include new hire's full name and the times that fit the schedule for basic and advanced IT orientation.

[https://portal-tools.une.edu/google\\_web\\_forms/portalwebforms/it-help-desk-self-service/](https://portal-tools.une.edu/google_web_forms/portalwebforms/it-help-desk-self-service/)

\_\_\_ Advanced ITS New Hire Training:

Create ticket through IT portal to request ADVANCED ITS Training, please include the new hire's full name and the times that fit the schedule. It is most beneficial to have this training in the 2<sup>nd</sup> or 3<sup>rd</sup> week of their schedule. Make sure to indicate on the ticket what systems or programs that are applicable for the position.

[https://portal-tools.une.edu/google\\_web\\_forms/portalwebforms/it-help-desk-self-service/](https://portal-tools.une.edu/google_web_forms/portalwebforms/it-help-desk-self-service/)



**Arrival: Manager Responsibilities : DAY ONE**

- \_\_\_ Schedule an appointment with the HR office (ext: 2283) to complete new hire paperwork\* and schedule a benefit meeting with Cat Martins ([cmartins@une.edu](mailto:cmartins@une.edu)), HR Benefits Administration Coordinator. A new employee is often not prepared to enroll in benefits on day 1 since they will most likely have a number of questions regarding benefits. So allow them the time to ask questions and return to HR for complete enrollment in benefits if necessary.
- \_\_\_ Introduce to co-workers.
- \_\_\_ Take employee to the Security office to pick up assigned key and have picture made for ID (if applicable).
- \_\_\_ Discuss procedures for scheduling time off and unexpected absences.
- \_\_\_ Review work schedule, pay schedule, and overtime policy (if applicable).
- \_\_\_ Review appropriate attire for workplace.
- \_\_\_ Go over fax, copier, office supplies other office related items.
- \_\_\_ Give department tour (bathrooms, water fountain, dining services, refrigerator, emergency exit, parking).
- \_\_\_ Give campus tour.
- \_\_\_ Arrange welcome lunch for new employee.

\*The new hire will have received a New Hire Packet. Additional information they will need to bring is a voided check and ID in order to complete the I-9 form (details of acceptable ID are on pg 9 of the document). The I-9 MUST be completed within 3 days of hire and the employee will not be able to work after the three days without the completion of this form.



Within 1<sup>st</sup> Week

- \_\_\_\_\_ The new employee will be sent the New Employee On-Line Orientation through Blackboard via Ed Doyle during the first week of work. Please allow time into their schedule for completing this training. *New hires must complete the orientation within the first 30 days of employment.*
- \_\_\_\_\_ Ensure employee has obtained parking permit. Instructions on obtaining a permit were in the new hire packet they received from HR but also can be found at (<V:\UNEDocs\HUMAN RESOURCES\OnBoarding>). Unless the employee parks off campus they must obtain a parking permit.
- \_\_\_\_\_ Review job responsibilities, competencies, and expectation; give the new employee a copy of their job description and discuss the priorities. Confirm with the new hire that they understand what the manager has reviewed with them.
- \_\_\_\_\_ Review the performance feedback and appraisal process. The manager will be contacted by HR 50-70 days after the new hire begins to complete the 90 day review. Be sure your employee knows the expectations and how they will be measured. Provide them with a copy of the 90 day review form with their job description (<V:\UNEDocs\HUMAN RESOURCES\OnBoarding>).
- \_\_\_\_\_ Review department's mission, strategy, values, functions, policies and procedures; organization of the department, review of organizational charts, critical members of the department and UNE, staff directory, department calendar (if applicable), confidentiality of information, emergency procedures, annual training, and call-in procedures.
- \_\_\_\_\_ Review department safety plan.
- \_\_\_\_\_ Introduce new hire to key departmental people, such as mailroom staff, payroll staff, etc.
- \_\_\_\_\_ Set up Ergonomic Evaluation of your new hire's work station through HR. Contact Cat Martins ([cmartins@une.edu](mailto:cmartins@une.edu)) at 207-602-2394. Any ergonomic adjustments/purchases will be made under the department budget.
- \_\_\_\_\_ Show them how to open/close the office (if applicable).
- \_\_\_\_\_ Review UNE Organizational Chart (<V:Drive UNE DOCS\Human Resources\Organizational Chart>).



### Within 2 weeks

- \_\_\_ Schedule weekly or monthly meeting to touch base with new employee.
- \_\_\_ Overview of budget and finance procedures and policies (if applicable). If necessary set appointment for new hire to meet with staff in AP to review policies and procedures.

### 1<sup>st</sup> month

- \_\_\_ Ensure your new employee enrolls for benefits within 30 days of hire date.
- \_\_\_ Review and clarify performance objectives and manager expectations after the first month.
- \_\_\_ Set meetings to discuss progress at 30 days and track results toward 90 day review.
- \_\_\_ The New Employee On-Line Orientation through Blackboard must be complete by the 30<sup>th</sup> day of employment. Managers must ensure the completion of these required trainings for compliance.

### Follow up

#### Within first 90 days

- \_\_\_ Performance Review must be conducted within the first 90 days. A 90 review form will be emailed to you 50-70 days after your new hire begins from HR. You must meet with the employee, review their performance, and return the signed form to HR for their personnel file.

#### 6<sup>th</sup> month (Recommended)

- \_\_\_ Performance review conducted.
- \_\_\_ Discuss training completed and planned training (if applicable).

#### Annual Performance Review

- \_\_\_ Conduct Annual Performance Review.
- \_\_\_ Set objectives for the coming year with employee.