Supervisor Checklist for
New Employee Onboarding

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**Supervisor Checklist for New Employee Onboarding**

UMass Boston has a vibrant, multi-cultural educational environment that encourages our diverse campus community to thrive and succeed. Part of that success is ensuring that new employees feel welcome and supported during their first few months of employment. Getting new employees off to a good start can make a big difference in their feeling welcomed and in their effectiveness on the job. Managers and supervisors play an important role in onboarding new employees and facilitating their transition to their new role on campus.

This checklist will guide managers and supervisors in effectively integrating new employees to the university and connecting them to the campus community.

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| **Pre-Arrival** |
| **Activity** |
| * Ensure new employee submits all pre-employment forms to HR
 |
| * Complete ePAF and submit for approvals
 |
| * Arrange a lunch with new employee on first day
 |
| * Call or email new employee to welcome and confirm start time, office hours and location
 |
| * Inform staff of new employee and explain the new employee’s role and relationship within the department
 |
| * Prepare and organize workstation for new employee (order office supplies, set up phone, computer, keys, purge old files, etc.)
 |
| * Determine and coordinate training needed for new employee
 |
| * Create first day and first week agenda for new employee
 |
| * Set up meetings with other departments to introduce employee
 |
| * Review New Employee Entrance Form; prepare access forms, which may include IT email request form, key request form, Procard, Blackboard
 |
| **First Day and First Week**  |
| **Activity** |
| * Ensure attendance at Benefits Orientation
 |
| * Welcome the employee (if possible make welcome eventful)
 |
| * Introduce to staff members and colleagues
 |
| * Take on tour of building and campus locations (work facilities, cafeterias, bookstore, library, ATM machines, mailroom, etc.)
 |
| * Explain operation of office equipment (phone, copier, computer logon and office systems, etc.)
 |
| * Provide keys, discuss office security, and ensure staff ID is obtained
 |
| * Explain the department’s mission and goals and provide departmental organizational chart
 |
| * Discuss new employee’s role and how it contributes to the department and university’s success
 |
| * Together, review and sign (both supervisor and employee) the job description and return to Human Resources
 |
| * Discuss critical job functions, expected performance standards and outcomes, and probationary period
 |
| * Review applicable department, university, or state policies and procedures
 |
| * Discuss workplace safety and emergencies
 |
| * Ensure registration for necessary training is complete
 |
| * Explain department and university acronyms and nicknames (WISER, HR Direct, Blackboard, Procard, LIUS, CAPS, etc.)
 |
| * Discuss time and attendance procedures
 |
| * Share any other necessary and advantageous information
 |
| **First Month** |
| **Activity** |
| * Establish goals and objectives for first month
 |
| * Schedule one on one meetings during probationary period
 |
| * Dedicate time to listen to comments, concerns and observations
 |
| * Provide clarity and consistency to employee’s questions
 |
| * Discuss protocol for handling issues or concerns
 |
| **Two to Six Months** |
| **Activity** |
| * Review goals and objectives for remainder of year
 |
| * Continue to coach employee for success
 |
| * Meet and discuss performance review and probationary timeframe
 |
| * Ensure training has completed and identify other learning opportunities as appropriate
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