

**Supervisor Checklist for Onboarding**

**System Office Employees**

***SYSTEM HUMAN RESOURCE SERVICES OFFICE***

***A Plan for a Successful First Year***

**Phase Five: Support Through the First Year**

**Phase Four: First 30-90 Days**

**Phase Three: First 30 Days**

**Phase Two: First Day/Week**

**Phase One: Before Employee’s First Day**

**Employee Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Unit:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Start Date:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Office Location:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **BEFORE EMPLOYEE’S FIRST DAY (PHASE ONE)** | |  |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | |  |
| **TASK** | **ASSIGNEE** | **COMPLETED** |
| **Communicate with your new employee** |  |  |
| □    Send a personal welcome letter/note/email |  |  |
| □    Connect with the new hire regarding the first day logistics (what time to arrive/work schedule, where to park/transportation, what to wear, eating options, etc.) |  |  |
| □    Communicate itinerary for first day or first week |  |  |
| [□   Provide guidance about getting to campus - campus map, bus, parking, local places to eat](https://www.hr.uillinois.edu/employment) |  |  |
| □    Arrange parking for new employee on first day to avoid parking ticket (UIC Parking; UIS Parking; UIUC Parking) |  |  |
| **Anticipate and Prepare for the new employee’s arrival** |  |  |
| □    Once background check has cleared (will be notified by SHRS) notify other staff in the unit that a new employee will be starting and provide start date and any pertinent information |  |  |
| □    Create an itinerary for the first week and communicate this with the new hire so they know what to expect. (Appendix A - Sample). Plan to be in the office on employee’s first day. |  |  |
| □    System HR will notify the unit of NetID and UIN and will process the new hire transaction. They will also establish new employee logon for UI New Hire. (Urbana AP and Chicago staff only) |  |  |
| * Order computer and technology tools as soon as possible |  |  |
| □    Arrange for phone and/or Skype setup (once UIN and start date established) (UIC Telecommunications; Springfield Skype for Business; Urbana Skype for Business; |  |  |
| □    Set up email, group mailboxes, email distribution lists, calendars, and calendar permissions (once UIN and start date established) (Chicago Email and Calendaring; UIS email; UIS Tech Service; Urbana Email, Calendar, and Conferencing) |  |  |
| □    Determine types of software access needed |  |  |
| □    Arrange for your department IT professional to meet with the new hire on the first day to ensure email accounts and any necessary software are up and running (requires entering service desk ticket) |  |  |
| [□   Confirm employee has completed E911 Acknowledgment (NetID required) (E911 General Information and Links to Forms)](https://answers.uillinois.edu/illinois/page.php?id=47509) |  |  |
| □    Arrange the workspace and ensure all supplies are available: |  |  |
| □    Order business cards and/or nameplate and/or business cards (UIC Creative and Digital Services; Springfield Creative Services; Urbana Business Cards and Stationery) |  |  |
| □    Provide necessary office supplies (pens, paper, etc.) |  |  |
| □    Ensure work area is clean |  |  |
| □    Ensure furniture and equipment is in good repair |  |  |
| □    Request keys and/or building access. If keys are available, it’s helpful to have another employee go with the new hire to get the key (Chicago Building Access; Chicago Keys; Urbana Locks and Keys; Springfield Key Request/ Card Reader Access) |  |  |
| □    Ensure new employee gets registered for System Office New Employee Orientation (System Human Resource Services will schedule the employee for New Employee Orientation, but the manager needs to ensure they attend – attendance required). |  |  |
| □    Contact unit director to update the org chart |  |  |
| □    Add employee to unit directory and website. (SHRS will update for UIC employees.) |  |  |
| □    Enter F&S service request to order a nameplate (if applicable) |  |  |
| □    Arrange to get a System Office pin from University Relations |  |  |
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| **EMPLOYEE’S FIRST DAY/WEEK (PHASE TWO)** | |  |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | |  |
| **TASK** | **ASSIGNEE** | **COMPLETED** |
| **Welcome** |  |  |
| □    If not already done, employee needs to go to System HR to do I-9 or to Campus HR for CS Urbana employees |  |  |
| □    Greet and show employee to their office space, where to put coats, lunch, etc. |  |  |
| □    Go over agenda for the day so they know what to expect |  |  |
| □    Tour office building and workplace |  |  |
| □    Meet co-workers (official or unofficial welcome) |  |  |
| □    Location of break room, kitchen, restrooms, mailbox, printer/copier, etc. |  |  |
| □    Ensure employee and supervisor signatures are included on the Job Description. This is sent with the offer letter and only needs to be done if not done previously. |  |  |
| □    Explain to whom the employee may go to with questions/concerns to when supervisor is not present |  |  |
| □    Share employee’s work contact information – phone, email, employee ID number |  |  |
| □    Discuss office hours and dress code |  |  |
| □    Discuss office protocols (go through handbook if applicable) |  |  |
| □    Consider having an office potluck at the end of the first week, to welcome the new employee. |  |  |
| **Additional Tasks** |  |  |
| □    I-Card and Parking - it’s helpful to have someone take the new hire in person to get their I-Card and parking permit if needed (I-Card; UIC Parking; UIS Parking; UIUC Parking) |  |  |
| □    Ensure employee attends Benefits Orientation and New Hire Benefit Sessions: (Chicago Course Registration, Springfield Course Registration, Urbana Course Registration)   * Ensure employee is aware of where the State Benefits enrollment site can be found at: <https://mybenefits.illinois.gov> |  |  |
| □    Determine any other needed training (for example – OBFS, Banner, etc.) (HR System Training and Documentation, OBFS Curriculum Guide) |  |  |
| □    Review unit security procedures |  |  |
| □    Generate card swipe and review procedures (if applicable) |  |  |
| □    Order T-Card and P-Card (if applicable) (T-Card; P-Card) |  |  |
| **Information Technology** |  |  |
| □    Discuss with employee IT related issues and arrangements. If necessary, arrange for IT professional to assist:(Chicago ACCC; Springfield IT Service; Urbana IT Services) |  |  |
| □    Computer – appropriate use and security |  |  |
| □    Computer/internet use policies |  |  |
| □    Email lists – add new employee |  |  |
| □    Office printer/copier |  |  |
| □    Access to shared drives |  |  |
| [□    VPN access (VPN Servers)](https://answers.uillinois.edu/page.php?id=73090) |  |  |
| □   Review Security of Confidential and Sensitive Information statement (if applicable) – sent with offer letter |  |  |
| □    Arrange for Outlook calendar to be shared (if applicable) |  |  |
| □    Ensure printing capabilities |  |  |
| □   Request access as applicable (Unit Security Contacts) for: |  |  |
| □    Banner |  |  |
| □    Supervisor to go over the following topics: |  |  |
| □   Scheduled meetings and events – add new employee to ongoing or upcoming meetings/events |  |  |
| □   E-mail policies – use, etiquette, expectations, out of office |  |  |
| [□ Review time entry requirements and process (e.g. Web Time Entry, AVSL, Positive Time Reporting (Time Entry Links)](https://www.hr.uillinois.edu/system_office_employees/hr_systems) |  |  |
| □   Accept meeting requests for any relevant meetings to attend |  |  |
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| **FIRST 30 DAYS (PHASE THREE)** | |  |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | |  |
| **TASK** | **ASSIGNEE** | **COMPLETED** |
| **Learning the Role** |  |  |
| □    Discussion items: |  |  |
| □    Review job description |  |  |
| □    Review expectations of position/job responsibilities (beginning of the performance management process) |  |  |
| □    Department norms/expectations |  |  |
| □    Preferences for communication with supervisor and colleagues – phone, email, one-on-one meetings |  |  |
| □    Written/unwritten rules – (e.g., what does “on time” to a meeting look like, checking work email or working from home) |  |  |
| □    Provide unit org chart |  |  |
| [□ Discuss the formal performance appraisal process (System Office Performance Management)](https://www.hr.uillinois.edu/system_office_employees/training_and_development_programs) |  |  |
| □    Role of position in relation to co-workers/team |  |  |
| □    Role of position in relation to other units within department |  |  |
| □    Introduce to co-workers in other units |  |  |
| □    Consider having a team lunch |  |  |
| □    Employee required to attend System HR New Employee Orientation (offered once per month in Urbana and once per month in Chicago) – registered by System HR |  |  |
| [□   Schedule other training: Banner, T-Card, P-Card, etc. (OBFS Curriculum Guide)](https://www.obfs.uillinois.edu/training/curriculum-guide/) |  |  |
| [□   Provide System org chart (Administrative Org. Charts)](http://www.pb.uillinois.edu/what-we-do/institutional-research-and-analytical-studies/administration/administrative-org-charts.cfm) |  |  |
| □    Civil Service: explain probationary form (either 6 months or 12 months depending on classification) |  |  |
| □    Explain acceptable and unacceptable performance behaviors and expectations |  |  |
| □    Review and schedule time for required trainings |  |  |
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| **FIRST 30 – 90 DAYS (PHASE FOUR)** | |  |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | |  |
| **TASK** | **ASSIGNEE** | **COMPLETED** |
| **About Your Organization and Unit** |  |  |
| □    Review the following items with the employee: |  |  |
| □    Job description (this will be a repeat but may be beneficial) |  |  |
| □    A brief history of the department |  |  |
| □    Department mission, vision, strategies, core values, goals |  |  |
| □    Departmental website, employee newsletter, other |  |  |
| □    Departmental growth-past and future |  |  |
| □    Industry awards and recognitions, areas where we excel in our industry |  |  |
| □    Acronyms & symbols related to department |  |  |
| □    Conduct tours of office, laboratories, plants, facilities, remote office locations |  |  |
| □    Plan team building and icebreaker exercises |  |  |
| **Departmental Commitment to Service** |  |  |
| □    Review the following items with the employee: |  |  |
| □    Department’s primary constituents (students, parents, faculty, staff, vendors) |  |  |
| □    Departmental partners—on and off campus |  |  |
| □    Services provided by the department |  |  |
| □    The importance of being a good service representative for the department |  |  |
|  |  |  |
| **SUPPORT THROUGH THE FIRST YEAR (PHASE FIVE)** | |  |
| **TASK** | **ASSIGNEE** | **COMPLETED** |
| **Helping Your New Employee Achieve Success in Their Role** |  |  |
| One-on-one meetings, communication, consistent feedback and constant engagement will help the new hire reach higher levels of productivity faster and will help your new employee become a fully integrated member of your organization. |  |  |
| □    Meet with employee at the end of each of the first several days to see how the day went |  |  |
| □    Schedule supervisor/employee check-ins after 30, 60, 90 days, and regular one-on-one meetings (bi-weekly is recommended, but this will depend on the position) |  |  |
| □    Ensure probationary form (for Civil Service employees) is completed on time (either 6 months or 12 months depending on classification) and return signed versions to SHRS at each interval. Address any performance concerns early on. |  |  |
| □    Provide on-going feedback, personally engage with your new hire and recognize their contributions |  |  |
| □    Around 90 days from the hire date, ask your new hire how their role aligns with what was described during the initial interview process. |  |  |
| □    Ask the new hire to share their own feedback on improvements and share who has been helpful during their transitional process. |  |  |
| □    At one year, it is an excellent opportunity to thank, motivate, and congratulate the employee. |  |  |

**APPENDIX A – SAMPLE ITINERARY**

**New Employee Name**

**New Employee’s Title**

***First Week Itinerary***

|  |  |  |
| --- | --- | --- |
| **Monday, Date** | | |
| **Time** | **Item** | **Location** |
| 8:30 AM | Meet with [Trainer, Supervisor or Office Manager]   * Tour of office * Set up desk and computer * Go through Office Handbook | Office # XXX |
| 9:30 AM | Meet with Director | Office # XXX |
| 10:15 AM | Meet with Co-Worker #1 | Office # XXX |
| 11:00 AM | Meet with Co-Worker #2 | Office # XXX |
| 11:45 AM | Lunch with New Employee’s Supervisor | TBD |
| 1:00 PM | Training Time | Employee’s Desk |
| 3:00 PM | Meet with Co-Worker #3 | Office # XXX |
| 3:30 PM | Meet with Co-Worker #4 | Office # XXX |
| 4:00 PM | Meet Co-Worker #5 | Office # XXX |
|  | | |
| **Tuesday, Date** | | |
| **Time** | **Item** | **Location** |
| 8:30 AM | Meet with New Employee’s Supervisor | Office # XXX |
| 9:00 AM | Meet with Department Head | Office # XXX |
| 10:00 AM | Quarterly Business Meeting | Conf Room # XXX |
| 12:00 PM | Office Lunch | TBD |
| 1:00 PM | Meet with Co-Worker #6 | Office # XXX |
| 1:30 PM | Meet with Co-Worker #7 | Office # XXX |
| 2:00 PM | Meet with Co-Worker #8 | Office # XXX |
| 2:30 PM | Meet with Co-Worker #9 | Conf Room # XXX |
| 3:00 PM | Training and Desk Time | Employee’s Desk |
|  | | |
| **Wednesday, Date** | | |
| **Time** | **Item** | **Location** |
| 8:30 AM | Desk Time | Employee’s Desk |
| 9:00 AM | Meet with Co-Worker #10 | Office # XXX |
| 9:30 AM | Meet with Co-Worker #11 | Conf Room # XXX |
| 10:00 AM | Meet with Co-Worker #12 | Office # XXX |
| 10:30 AM | Training Time | Employee’s Desk |
| 12:00 PM | Lunch with Trainer | TBD |
| 1:00 PM | Tour of Henry Administration Building | HAB |
| 2:00 PM | Training and Desk Time | Employee’s Desk |
|  |  |  |
| **Thursday, Date** | | |
| **Time** | **Item** | **Location** |
| 8:30 AM | Desk Time | Employee’s Desk |
| 9:00 AM | Meet with Co-Worker #13 | Office # XXX |
| 9:30 AM | Meet with Co-Worker #14 | Office # XXX |
| 10:00 AM | Training Time | Employee’s Desk |
| 12:00 PM | Lunch with Assistant Vice President’s Team | TBD |
| 1:30 PM – 5 PM | Training and Desk Time | Employee’s Desk |
|  |  |  |
| **Friday, Date** | | |
| **Time** | **Item** | **Location** |
| 8:30 AM – 5 PM | Desk Time & Training | Employee’s Desk |
|  |  |  |
| **Other Scheduled Events** | | |
| Wednesday  Date  8:30am – 3pm | New Employee Orientation | Conf Room # XXX |

## *Each unit may customize this document to add additional resources specific to your organization/unit. This might include links to org charts, a list of acronyms specific to your unit, or links to specific policies or training material.*