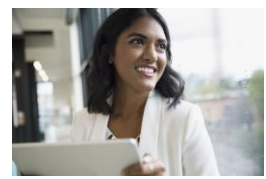# Supervisor's Onboarding Checklist

Please use this list to ensure you complete the critical steps of the Employee Onboarding process. Questions? Contact your HR (Human Resources) Business Partner, AskHR@yc.edu, or x2217.

New Employee: _____ Y#: _____
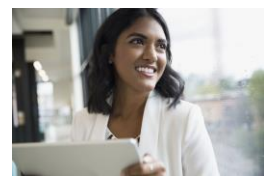
YC Email Address: _____ Position: _____

## Before Your New Hire's First Day

**Preliminary Steps:**
- ★ Your HR Talent Acquisition Specialist will notify you via email that your finalist has verbally accepted the position with a tentative start date (subject to background check, references, completion of I-9 and degree confirmation).
- ★ The HR Talent Acquisition Specialist emails a formal Electronic offer letter to the finalist (cc: hiring mgr.) with instructions on the next steps.

| DONE | TASK | DESCRIPTION (refer to the Onboarding at YC page for resources) |
|---|---|---|
| ☐ | Welcome | Once the background check, I-9 ID, and other requirements are complete: <br> • HR enters the hire into Banner and emails the Hiring Manager to notify them that their new hire has completed their requirements and their Y# <br> • The Supervisor should call their new employee within 24 hours to welcome them to their team and confirm their start date. |
| ☐ | Email Verification | The supervisor receives a New Employee Hire/Separation Alert email within 24 hours of Banner entry with their new employee's Y#, YC email, username, and temporary password. Verify that their YC email appears one day after Banner entry. |
| ☐ | Initiate Access to YC Resources | Initiate the employee's required access by completing the New Hire Onboarding Form (**Y# and YC email required**). This will generate email notifications to you and the relevant YC departments based on the information you provide including building access, keys, name plates, phone & IT equipment/services. |
| ☐ | Supervisor Training | Complete/review the Onboarding Training for Supervisors in the Toolkit to understand the full process and how to access the tools and links needed. |
| ☐ | Create Welcome Letter & First Day Schedule | Create an Employee Welcome Letter (Sample) and 1st Day Schedule (sample).pdf, and email these to the employee **the week before their start date** <br> • Ensure that time is reserved on your calendar and that others who are involved also have been invited |
| ☐ | Position Description & Expectations | Review the current Job Description and/or list of duties and responsibilities and prepare to review these with them in the first week, including your expectations |
| ☐ | Planning | Choose a co-worker to be the new employee's guide when you are not available and discuss your expectations with them (daily check-ins, training, resource). <br> • Inform co-workers of the new employee's start date and duties <br> • Schedule lunch with the new employee during their first day or week <br> • Schedule meetings to check in with them during the first week/month <br> • Plan meaningful work assignments for employee's first few days <br> • Confirm the dates for the next HR Orientation (the 1$^{st}$ Wednesday of the month) and Warm Welcome (scheduled two times per year during the Fall and Spring semesters) |

# Supervisor's Onboarding Checklist

## Before Your New Hire's First Day (cont'd)

| | | |
|---|---|---|
| ☐ | Training Plan | Create a job-specific training plan and coordinate with others who will be assisting. Note: your HRBP assigns required training with a due date 30 days from hire date. |
| ☐ | Work Area | Set up employee's workspace with office supplies and important resources |
| ☐ | Frequently Asked Questions (FAQs) | Review Frequently Asked Questions for Supervisors for help with any issues. |
| ☐ | Instructions for Approving Time | If you are not already familiar with the process for approving work hours and time-off, review the Time Entry Approval for Supervisors tutorial on the Payroll page. |
| ☐ | Additional Resources | If you complete the New Hire Onboarding Form, most of the requests below have already been initiated, and you have received emails from the departments with instructions. In cases where a YC employee is transferring or taking a new position, you may need to submit the requests below.<br>• Submit a request for the employee's computer and other IT equipment using the Computer Request Form<br>• Review IAM-Access Mgr Information/Training and request employee YC system access through Access Manager<br>• Facilities request procedures are here: Location Access Procedure. Submit the Location Access Request Form to request keys and/or building access<br>• Request a print code for a new employee - Request a PaperCut user account<br>• Order business cards & name badges - Access to Papercut's Job Ticketing |

## On Your New Hire's First Day

| DONE | TASK | DESCRIPTION |
|---|---|---|
| ☐ | Welcome! | Meet and welcome your new hire when they arrive |
| ☐ | Department Tour | Introduce co-workers and give a short department tour (including break room, restrooms, office space, etc.) A longer tour may be included on their first day but may be better scheduled for later in the week. |
| ☐ | System Access & Orientation | Assist, or have someone help the employee with their initial YC system login and setting up multi-factor authentication. Verify that they can access the resources you requested, sign in, and access their email, shared drives, and applications. Direct them to the IT Helpdesk Request as appropriate. |
| ☐ | YC OneCard ID | Confirm if they already have a YC OneCard or if they need to upload their photo. It is important for them to complete this as soon as possible so that we can get an ID card printed with their office access attached |
| ☐ | Key Pick-up | Confirm if they need to pick up keys or ID and where to do that depending on campus/center. |

# Supervisor's Onboarding Checklist

| | New Hire Essentials | Direct them to the New Employee Essentials.pdf for highlights of working at YC and resources they can review on their own |
|:---:|---|---|

## On Your New Hire's First Day (cont'd)

| DONE | TASK | DESCRIPTION |
|:---:|---|---|
| ☐ | Pay and Time Off Procedures | • Review payroll policies including payroll periods & pay dates, where to find their time sheet and how to request time off and enter hours.<br>• Share your contact information (or the appropriate person) and how they should make contact outside of work hours (being out sick, etc.) |
| ☐ | New Hire Announcement | Create a New Hire Announcement - Sample to be distributed via a Duck Soup email and submit this form using a Mass email request form |
| ☐ | Meeting with Employee | • Meet with your new hire on the first day to provide an overview of:<br>• Their role, responsibilities, and your expectations<br>• Their work schedule, lunch, and other breaks, working remotely or onsite guidelines, upcoming key meetings and event dates<br>• Training plan and who will be working with them<br>• How to access their required training in My Learn |
| ☐ | Other topics | Assign meaningful work assignments for their first day/week. This may include reviewing department share drives, documents, and procedures, exploring the YC website, setting up email and calendaring, observing co-workers, starting their required training, attending meetings, and meeting with co-workers. |

## The First Few Weeks

| DONE | TASK | DESCRIPTION |
|:---:|---|---|
| ☐ | Department Overview | Review the Check-In Meeting document for the first few weeks. Provide an overview of the functions of your department: goals, structure, management, interaction with other departments and where they fit within the structure |
| ☐ | Training | • Review required online training and due dates (usually 30 days for required courses)<br>• Help them schedule training sessions including Outward Mindset, department-specific training, performance management sessions in NeoGov, etc. |
| ☐ | Email, Calendars & Phones | • Review email and calendar protocol and usage tips – have them create their email signature and share their calendar with co-workers<br>• Review phone set-up, department phone procedures and etiquette |
| ☐ | Resources | • Review technology access and any challenges they are experiencing, and assist them in resolving these<br>• Show them where to submit a Help Desk Technical Support Request<br>• Refer them to the Employee Resources and Links page for YC |
| ☐ | Mission, Vision & Values | • Review the YC mission, vision, strategic initiatives, and organizational structure (information found here: The College Mission)<br>• Present the YCWay principles and how they apply every day at YC |
| ☐ | YC Policies | Review important College Policies and where they can be found |

# Supervisor's Onboarding Checklist

| | | |
|---|---|---|
| ☐ | Performance Management | Review the Performance Management at YC page & introduce the goal-setting process. |

## The First Few Weeks (cont'd)

| DONE | TASK | DESCRIPTION |
|---|---|---|
| ☐ | YC Health & Safety | Provide information about YC safety procedures and the alertYC system |
| ☐ | Benefits and New Hire Tasks | • Review where to find Total Rewards & Benefits information<br>• Remind them that benefits enrollment closes at the end of their first 30 days<br>• Review any outstanding new hire tasks such as submitting a Relocation Reimbursement form. |
| ☐ | Meeting with Co-workers | Introduce them to other key departments and encourage them to set up (meet to learn) meetings with people they will be working with. Review YC Org Charts. |
| ☐ | Debrief and Next Steps | Review the Check-in Meetings During the First Month and discuss the 30-day training plan, meeting dates, priorities, and deadlines |

## Check-in Meetings

| DONE | TASK | DESCRIPTION |
|---|---|---|
| ☐ | 30-day meeting | Review the Check In Meeting at 30 Days document<br>• Confirm they have completed their required training courses<br>• Communicate the 60- and 90-day training plan |
| ☐ | 60-day Meeting | Review the Check In Meeting - 60 Days document<br>• Confirm they have entered their goals in My Perform |
| ☐ | 90-day Meeting | Review the Check In Meetings - 90 Days document<br>• Discuss progress on goals, review performance and any development goals |
| ☐ | 6-month Meeting | Review the Check In Meetings - 6 months.pdf<br>• Discuss progress on goals, review performance and any development goals |

## One Year Check-in

| DONE | TASK | DESCRIPTION |
|---|---|---|
| ☐ | One Year Check-in Meeting | Review the Check In Meetings - 1 Year<br>• Meet with your employees to go over their first year and their progress on goals. Identify opportunities and recognize their successes. |
| ☐ | Celebrate! | Celebrate your employee's one-year anniversary in their role. (Be mindful of how your employee wishes to be recognized) |