



New Hire Onboarding Checklist for Managers

This checklist is designed to assist with the department's orientation process. Onboarding is a long-term process that begins before an employee's start date and continues at least through the first year of hire. This checklist is organized chronologically and helps hiring managers prepare for the arrival of new employees. Once an employee starts, the employee can work together with the hiring manager and an onboarding peer as designated by the hiring manager. Employees who were hired internally and are transferring to a different department, may be able to omit items that are not applicable.

Upon Determination of Successful Candidate

Manager Responsibilities

- Move forward successful candidate to offer in [Workday](#).
- Complete "Initiate Offer" task in Workday.
 - When determining hire/start date, remember that [IT](#) needs at least five business days, preferably 10, to prepare a computer and schedule the pick-up.
- Complete Questionnaire in Workday (after HR generates offer letter).

HR Responsibilities

- Generate offer letter for successful candidate.
- Initiate background check for successful candidate (after successful candidate signs offer letter).

Successful Candidate (New Hire) Responsibilities

- Sign offer letter in Workday.

Before the First Day

HR Responsibilities

- HR will launch Workday actions items for new hire to complete in Workday.

New Hire Responsibilities

- New hires complete/confirm the following Workday onboarding action items:

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- Out-of-State Work Question
- Preferred Name
- Legal Name
- Home Contact Information
- Personal Information (Government ID)
- Student Loan Question
- Disability Self-Identification Question
- Veteran Status Question
- Payment Election Enrollment (Direct Deposit)
- Identification of Emergency Contact(s)
- Federal Withholding Elections
- State and Local Withholding Elections
- Confidentiality Agreement
- Life Insurance Benefits Coverage Question (Spouse /Domestic Partner Employed at Furman)
- I-9 Form
- Information for Retirement Plan Purposes

Manager Responsibilities

- Send new hire a welcome e-mail or letter. This is separate from the offer letter. The communication should include:
 - Date and time to arrive on the first day
 - [Documentation](#) to bring to HR on the first day
 - Location to report to and who to ask for upon arrival
 - [Parking](#) information
 - What to expect during the first days of the job (including a schedule of the first few days, if possible)
 - [Dining](#) options on campus
- Send an informal announcement to the department/division about the new hire, including background information and qualifications. Encourage those colleagues to send the new hire an e-mail.
- Identify an onboarding peer. This is a current employee within the department or division who is a peer to the new employee. This individual can assist in the onboarding process and be a “go-to” person as directed by the hiring manager.
- Schedule appointments with individuals that the new hire should meet within the first few days and weeks (if applicable). These can be colleagues within the division, or campus partners with whom the new hire will interact.
- Set aside time in your calendar to make sure you are available for the first few days and weeks of your new hire’s employment.

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- Arrange for tour of office/department as well as campus.
- Identify workspace or area for assignment.
- Furnish workspace (desk, chair, files, etc.).
- Purchase and/or make available necessary office supplies such as pens, post-its, message pads, etc.
- Make arrangements with the following departments/entities for additional necessary items.

Facilities

Complete the [request form](#) to obtain the following:

- Keys
- Card Access
- Office Signage
- Painting/Cleaning
- Furniture

ITS

Contact: [IT Service Center](#) or [✉](#)

- Computer/Laptop (if applicable)
- Network Access (username and password)
- E-Mail Account
- Phone
- Voicemail Access
- Folder/Drive Access (if applicable)

Name Tag

- [E-mail Exclamark](#) the name and title of the new hire. Exclamark is located at 5000 Old Buncombe Road, Suite 6, in the Publix Shopping Plaza.

Business Card (if applicable)

- Business cards may be ordered through the [Furman Online Print Store](#). Access the Online Print Store through the A-Z Index on MyFurman. It will be necessary to create an account, if you or your designee (e.g., administrative assistant) does not have one.

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Apparel (if applicable)

- Athletics – [✉](#)
- Facilities/Grounds – [✉](#)
- Housing/Residence Life – [✉](#)

First Day

HR Responsibilities

- Ensure I-9 documentation requirements are met
- Remind new hire of orientation date / time (first Tuesday on/after first day)

New Hire Responsibilities

- Attend New Employee Orientation (first Tuesday on/after first day)
- Complete Workday To-Do items:
 - E-Mail and Network Account Information
 - [Present I-9 Supporting Information](#) **within 3 days of start date** (in-person at the Office of Human Resources)
 - ID card - New hire will receive a Workday task to obtain an ID card. New hires can also request an ID card [online](#) but still need to click the 'submit' button in Workday, to remove the task from their inbox. When requesting the ID card online, the new hire will need to provide:
 - Furman ID Number
 - Name
 - Date of Birth
 - ID type (e.g., staff, faculty)
 - ID Card Status (e.g., first Furman ID card)
 - Upload an ID picture
 - E-mail
 - Acknowledgement
 - Parking Decal - New hire will receive a Workday task to obtain a parking pass for complimentary parking on campus. New hires can also request a parking pass [online](#) but

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still need to click the 'submit' button, in Workday, to remove from their inbox. The new hire will need:

- Employee ID Number
- Driver's License Number and State
- Vehicle Make, Model, Color and Year
- Registered Owner Information and Relationship to Driver
- License Plate Number and State

Manager Responsibilities

- Show new hire workspace/desk
- Introduce new hire to team members/colleagues
- Ensure that the new hire has presented the [necessary I-9 documentation](#) to HR **within 3 days of start date**
- Arrange for the new hire to double check status of essential items including:
 - [Network Access \(ITS\)](#)
 - [Keys \(Facilities\)](#)
 - [TAP Card \(Financial Services\)](#)
 - [ID Card \(Human Resources\)](#)
- Meet with new hire to explain hours of regular business day, communicating when need to be absent, lunch schedule/office coverage, dress code, etc.
- Review and clarify all safety procedures, including locations of fire alarms, AEDs, evacuation routes, etc.
- Review all applicable equipment (e.g., copier, fax machine, mower, vacuum cleaner, etc.)
- Provide instructions for [phone, voicemail](#), login for MyFurman
- Review [daily time-keeping requirements](#) (applicable for non-exempt employees)
- Review [Paid Time Off \(PTO\) policy](#)

First Week

Manager Responsibilities

- Provide a tour of the building and campus [Administration Building, Trone Student Center, Daniel Dining Hall, McAlister Auditorium, Younts, Timmons Arena, Estridge Commons (FUPO), etc.]
- Introduce new hire to colleagues and campus partners
- Arrange for [software training](#) (if applicable)
- Peruse [Workday Help @ Furman](#) site for suggested on-demand help documents and [Workday Training](#)
- Provide link to [University policies and procedures](#)
- Review select policies including:
 - [817.8 \(Employee Regulations and Responsibilities\)](#)
 - [819.1 \(Staff Paid Time Off\)](#)
 - [819.2 \(Holidays for Staff and Administrators\)](#)
 - [858.1 \(Time Worked/Time Off for Staff Personnel\)](#)
- Review job description and performance objectives
- Communicate expectations of job duties/responsibilities
- Communicate behavioral, ethical, and cultural expectations in the department/division/University
- Review the department's structure and how strategies and goals of the department relate and align with Division/University goals
- Explain new hire's relationship with other departments/divisions
- Begin review of [performance management](#) initiatives with new hire including:
 - Discuss/identify competencies for annual performance evaluation and update in Workday
 - Discuss and identify three to five SMART goals and ask new hire to enter those goals into Workday
- Schedule weekly check-ins during the first 30 days

First 30 Days

New Hire Responsibilities

- Complete Benefit elections
- Complete required compliance trainings including:

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- Title IX – “Harassment Prevention and Title IX (Non-Supervisor)”
 - Data Security Awareness
- Complete review of performance review process educational materials including:
- View the tutorial “[Evaluation Workshop for New Staff Members.](#)”
 - Download and review New Staff member To-Do Checklist (for the performance review process)
 - View the tutorial “[Writing SMART Goals](#)”
 - Download and utilize the “[SMART Goal worksheet for Staff Members](#)”
 - View the tutorial “[How to Edit, Add, and View Goals](#)”
- Enter three to five identified SMART goals into Workday

Manager Responsibilities

- Keep scheduled check-in meetings. During the meetings inquire:
- How the new hire is doing?
 - Does the new hire find the work meaningful?
 - Has the new hire experienced any surprises and if so, what are they?
 - Is the new hire receiving the necessary support from the manager and colleagues?
 - Does the new hire have the necessary training, equipment, software, and other resources to successfully perform work duties?
 - Has the training been helpful?
 - Is there any additional training, equipment, software, or other resources necessary to successfully perform work duties?
 - What challenges has the new hire encountered?
 - What is the new hire’s understanding of the job and perception of the department/unit/division/ University?
- Provide valuable feedback, either formally (during regularly scheduled meetings) or informally (constructive comment while working on a task, an e-mail, or job shadowing). The feedback should be timely, specific, purposeful, credible, and behavior based.
- [Edit the competencies](#) for the new hire’s position in Workday. View instructional tutorials “How to View Competencies” and “How to Edit Competencies” prior to editing.
- [Review and approve goals](#) entered by the new hire in Workday. View instructional tutorial “How to Approve Goals” prior to reviewing the new hire’s goals.
- [Cascade any additional goals](#) that are necessary for the new hire to complete during the initial year (and perhaps necessary for the entire team/department to complete during the particular evaluation year. View instructional tutorial “How to Cascade Goals” prior to adding goals for your new hire, direct reports, or other staff members within your unit.

30 to 60 Days

Manager Responsibilities

- Continue with regularly scheduled meetings. During the meetings inquire:
 - Whether the new hire has a good understanding of expectations
 - Whether there were any surprises regarding expectations and if so, what those surprises were
 - Whether the new hire believes enough feedback is being offered by you as the manager regarding the new hire's performance
 - Status of new hire requisite trainings
 - Whether the training was helpful, and if there are other trainings, materials, supplies, etc. that would be beneficial for the new hire?
 - Whether the new hire feels supported by the manager and by team members

60 to 90 Days

Manager Responsibilities

- Continue with regularly scheduled meetings. During the meetings inquire:
 - Whether the new hire has a grasp of the position and how it fits within the department/unit
 - Whether there is any concern that the new hire previously brought to your attention, but for whatever reason, has not been addressed/resolved
 - Whether the new hire has addressed any challenges that were previously brought to the new hire's attention
 - Whether the new hire has experienced any frustrations associated with the position
 - Ask the new hire to identify elements of the work that are enjoyable

90 Days and Beyond

HR Responsibilities

- New Hire should receive the stay interview through Workday

New Hire Responsibilities

- Complete the stay interview

Manager's Responsibilities

- Continue with regularly scheduled meetings. During the meetings inquire:
 - Whether there are any questions about the performance review process.
 - Whether there are any specific professional development options that are of interest.
 - Whether there are things as a supervisor that you can do to support the career development and goals of the new hire.
 - Whether there are different aspects of the position in which the new hire wishes to gain more experience.
 - What the new hire believes is the most significant accomplishment thus far.