# Checklist for Supervisors and HR Admins

## Before the Start Date

### Schedule and Job Responsibilities

- Ensure data form, confirming new hire, has been received by Human Resources
- Arrange for employee’s central ID login information (required for access to Courselink where they will complete required training during NEW days or in the unit.)
- Contact employee
- Set up meetings with key people for employees’ first few weeks
- Create agenda for employee’s first day in the unit
- Put together welcome packet from the unit

#### Add to new employee’s calendar
- Include start date, place, time, dress code, parking
- Provide employee with their UofG ID number
- Contact employee
- Confirm start date, place, time, dress code, parking
- Provide employee with their UofG ID number
- Set up meetings with key people for employees’ first few weeks
- Create agenda for employee’s first day in the unit
- If appropriate
- Put together welcome packet from the unit
- Include the following:
  - Job description
  - Welcome letter
  - Job manual or employee handbook
  - Contact names for the department
  - Schedule for the first week
  - Department/unit organization chart
  - Department/unit phone/email list
  - Map of campus
  - Parking and transportation information
  - Mission/vision and strategic priorities for the University and department/unit if appropriate

### Socialization

- Notify your department of the new hire
- Send via email to department
- Copy the new employee if appropriate
- Assign a “buddy” if appropriate

### Benefits

- HR Service Associate will arrange an appointment with employee to set up benefits within the first two weeks of employment.
- Determine needed payroll information
- Submit payroll documentation

### Work Space

- Ensure work area is clean
- Pull together basic office/desk supplies if appropriate
- Provide key/card for access to office/cabinets if appropriate
- Order business cards, name tag, name plate if appropriate

### Technology Access and Related

- Order computer
- Contact tech support team to have system set up if appropriate
- Arrange for phone installation if appropriate
- Submit requests for access to Enterprise-wide system software if appropriate

### University Welcome, Orientation and Training

- Ensure the employee is registered in N.E.W. days – the 2-day start of UofG’s NEW@theU Program
- Schedule of dates and sessions can be found on the HR website in section NEW@theU
## Checklist for Supervisors and HR Admins

- **Prepare a job specific training schedule for the Employee**
  - Example could include:
    - Financial Reporting System (FRS)

### Employee’s First Day in the Unit

- **Welcome upon arrival**

- **Provide overview of the first day and work week**

- **Introduce them to department and team members**
  - Introduce buddy (if using one)
  - Break/lunch areas
  - Restrooms
  - Building access keys/cards

- **Introduce them to the appropriate Environmental Health and Safety online training module and ensure it is completed within their first 3 days. (If they attend NEW Days this is included).**
  - Registration link: [https://www.uoguelph.ca/ehs/courses/index.cfm](https://www.uoguelph.ca/ehs/courses/index.cfm)

- **Provide welcome packet and take time to discuss contents**
  - Review contents of packet and provide time for them to look through it on their own
  - Onboarding activities and training schedule and timeline
  - Relevant websites
  - Emergency contact information
  - Review start times, end times, breaks, holiday requests (if appropriate)
  - Department/unit organization chart

- **Introduce them to work area**
  - Supply them with keys, ID
  - Show them how to order supplies
  - Show them where to obtain Employee ID Card
  - Overview of software and other technology use (Gryphmail, telephone/voicemail, internet, other relevant sites)
  - Review safety procedures
  - Introduce them to office computer network (shared files or drives)
  - Show them how to use the copier
  - Provide instructions for phone usage and voicemail

- **Introduce them to the department/unit**
  - Take them on a tour of the building
  - Show them the elevators, stairs, exits, kitchen area if available, closets
  - Introduce them to key departmental people
  - Show them how to open/close office if appropriate
  - Provide tour of different areas of campus as appropriate to their position

- **Arrange to take them to lunch on the first day in the unit**
  - Include other employees if possible

- **Discuss transportation and parking**
  - Arrange for purchase of parking pass if required

- **Additional**

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### Checklist for Supervisors and HR Admins

#### Employee’s First Week

<table>
<thead>
<tr>
<th>Task</th>
<th>Task</th>
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<tbody>
<tr>
<td>- Show them training schedule</td>
<td>- Pre-schedule training where practical/possible</td>
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<tr>
<td></td>
<td>- Talk about overall training timing</td>
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<tr>
<td>- Ensure they have N.E.W. @ the U schedule of activities and training</td>
<td>- Provide them with the url where they will find the connections to training and onboarding sessions</td>
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<td>- Technology check-in</td>
<td>- Verify working computer</td>
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<td>- Departmental access</td>
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<td>- Printer hook-up</td>
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<td></td>
<td>- Gryphmail and calendaring</td>
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<tr>
<td></td>
<td>- Phone/voicemail</td>
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<td>- Review org chart for the department</td>
<td>- Inquire how first week went</td>
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<td>- Make time to listen to any questions</td>
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<td>- Encourage questions</td>
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<td>- Explain your work style and discuss how it will fit with the style of the new worker</td>
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<td>- Meet or touch base with new employee daily to answer questions</td>
<td>- Provide list of current department projects and cyclical programs, highlighting roles of other departmental members</td>
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<tr>
<td>- Review job description</td>
<td>- Discuss University websites and resources</td>
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<td></td>
<td>- Employee online directory</td>
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<td>- Human Rights and Equity Office</td>
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<td>- Occupational Health and Wellness Program</td>
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<td>- Environmental Health and Safety</td>
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<td>- Employee Assistance Program</td>
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<td>- Ergonomics consultation</td>
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<td>- Recreational facility</td>
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<td>- Learning &amp; Development</td>
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<td>- Vehicle and Travel Policy</td>
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<td>- Tuition Waiver</td>
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<td>- Leave for Change Program</td>
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<td>- Better Planet Project</td>
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<tr>
<td>- Show employee where to go to obtain a UofG I.D. card (this is their official ID and electronic access)</td>
<td>- Who to contact</td>
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<td>- Where to go with questions</td>
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<td>- How to register</td>
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<tr>
<td>- Introduce the <a href="#">CCS Help Centre</a> as the place to go for central IT support, campus-wide.</td>
<td>- Share <a href="#">Your Guide to Centralized IT Services on Campus</a></td>
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<td>- Confirm departmental IT contact</td>
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<td>- Add new employee to relevant distribution lists</td>
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</table>

#### Employee’s First Month

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Checklist for Supervisors and HR Admins

- Weekly or bi-weekly meetings with new employee
  - Answer their questions and help foster engagement with the organization
  - Ensure they have completed the required training and activities scheduled to be done in the first month

- Check in about benefits and pay
  - Ensure they have access
  - Answer any questions they have

- Ensure participation/registration in N.E.W. days
  - Check on timing of first session if not yet occurred
  - Inquire how it went if attended

- Discuss G.O.A.L. process for performance planning, assessment and development
  - Ensure they have registered for the Intro. To GOAL session through L&D; Supervisors are to register for the Management Essentials Program Course: Performance Planning, Assessment and Development

- Conduct a performance dialogue and review with the employee their performance objectives, standards if available, and expectations
  - These are captured on the Performance Dialogue worksheet; both the Supervisor and Employee should keep a copy and review periodically

- Discuss relevant job rules and regulations

- Check in on buddy
  - Talk with buddy if appropriate
  - Talk with new employee about buddy relationship if appropriate

- Discuss learning and development policies and procedures

- Additional

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Employee’s First Three Months

- Ensure continued participation in N.E.W. @ the U Activities and Training
  - Answer their questions and help foster engagement with the organization

- Performance conversation
  - Can be informal
  - Let employee know how they are doing
  - Ask questions

- Additional

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Employee’s First Six Months

- Ensure continued participation in N.E.W. @ the U Activities and Training

- Conduct performance assessment (mid-year review) using G.O.A.L.
  - More formal
  - Document for probation purposes

- Revisit performance objectives and revise if required

- Check in with questions

- Additional
<table>
<thead>
<tr>
<th>After Probationary Period</th>
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<tbody>
<tr>
<td>☐ Celebrate end of probationary status</td>
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<tr>
<td>☐ Schedule annual performance review</td>
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<tr>
<td>☐ Additional</td>
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</tbody>
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