

Checklist for Supervisors and HR Admins

Before the Start Date	
Schedule and Job Responsibilities	
<input type="checkbox"/> Ensure data form, confirming new hire, has been received by Human Resources	Data form gets completed upon receipt of a signed back letter of offer from the new employee
<input type="checkbox"/> 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.)	
<input type="checkbox"/> Contact employee	<input type="checkbox"/> Confirm start date, place , time, dress code, parking <input type="checkbox"/> Provide employee with their UofG ID number
<input type="checkbox"/> Set up meetings with key people for employees' first few weeks	Add to new employee's calendar
<input type="checkbox"/> Create agenda for employee's first day in the unit	If appropriate
<input type="checkbox"/> Put together welcome packet from the unit	Include the following: <input type="checkbox"/> job description <input type="checkbox"/> Welcome letter <input type="checkbox"/> Job manual or employee handbook <input type="checkbox"/> Contact names for the department <input type="checkbox"/> Schedule for the first week <input type="checkbox"/> Department/unit organization chart <input type="checkbox"/> Department/unit phone/email list <input type="checkbox"/> Map of campus <input type="checkbox"/> Parking and transportation information <input type="checkbox"/> Mission/vision and strategic priorities for the University and department/unit if appropriate
Socialization	
<input type="checkbox"/> Notify your department of the new hire	<input type="checkbox"/> Include start date, what their job will be, and employee bio
<input type="checkbox"/> Send via email to department	
<input type="checkbox"/> Copy the new employee if appropriate	
<input type="checkbox"/> Assign a "buddy"	If appropriate
Benefits	
<input type="checkbox"/> HR Service Associate will arrange an appointment with employee to set up benefits within the first two weeks of employment (provided data form received).	<input type="checkbox"/> Determine needed payroll information <input type="checkbox"/> Submit payroll documentation
Work Space	
<input type="checkbox"/> Ensure work area is clean	
<input type="checkbox"/> Pull together basic office/desk supplies	If appropriate
<input type="checkbox"/> Provide key/card for access to office/cabinets	If appropriate
<input type="checkbox"/> Order business cards, name tag, name plate	If appropriate
Technology Access and Related	
<input type="checkbox"/> Order computer	
<input type="checkbox"/> Contact tech support team to have system set up	If appropriate
<input type="checkbox"/> Arrange for phone installation	If appropriate
<input type="checkbox"/> Submit requests for access to Enterprise-wide system software	If appropriate
University Welcome, Orientation and Training	
<input type="checkbox"/> 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

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<input type="checkbox"/> Prepare a job specific training schedule for the Employee	Example could include: <input type="checkbox"/> Financial Reporting System (FRS)
Employee's First Day in the Unit	
<input type="checkbox"/> Welcome upon arrival	
<input type="checkbox"/> Provide overview of the first day and work week	
<input type="checkbox"/> Introduce them to department and team members	<input type="checkbox"/> Introduce buddy (if using one) <input type="checkbox"/> Break/lunch areas <input type="checkbox"/> Restrooms <input type="checkbox"/> Building access keys/cards
<input type="checkbox"/> 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?
<input type="checkbox"/> Provide welcome packet and take time to discuss contents	<input type="checkbox"/> review contents of packet and provide time for them to look through it on their own <input type="checkbox"/> Onboarding activities and training schedule and timeline <input type="checkbox"/> Relevant websites <input type="checkbox"/> Emergency contact information <input type="checkbox"/> Review start times, end times, breaks, holiday requests (if appropriate) <input type="checkbox"/> Department/unit organization chart
<input type="checkbox"/> Introduce them to work area	<input type="checkbox"/> Supply them with keys, ID <input type="checkbox"/> Show them how to order supplies <input type="checkbox"/> Show them where to obtain Employee ID Card <input type="checkbox"/> Overview of software and other technology use (Gryphmail, telephone/voicemail, internet, other relevant sites) <input type="checkbox"/> Review safety procedures <input type="checkbox"/> Introduce them to office computer network (shared files or drives) <input type="checkbox"/> Show them how to use the copier <input type="checkbox"/> Provide instructions for phone useage and voicemail
<input type="checkbox"/> Introduce them to the department/unit	<input type="checkbox"/> Take them on a tour of the building <input type="checkbox"/> Show them the elevators, stairs, exits, kitchen area if available, closets <input type="checkbox"/> Introduce them to key departmental people <input type="checkbox"/> Show them how to open/close office if appropriate <input type="checkbox"/> Provide tour of different areas of campus as appropriate to their position
<input type="checkbox"/> Arrange to take them to lunch on the first day in the unit	<input type="checkbox"/> Include other employees if possible
<input type="checkbox"/> Discuss transportation and parking	<input type="checkbox"/> Arrange for purchase of parking pass if required
<input type="checkbox"/> Additional	<input type="checkbox"/> <input type="checkbox"/>

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

Employee's First Month

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<input type="checkbox"/> Weekly or bi-weekly meetings with new employee	<ul style="list-style-type: none"> Answer their questions and help foster engagement with the organization <input type="checkbox"/> Ensure they have completed the required training and activities scheduled to be done in the first month
<input type="checkbox"/> Check in about benefits and pay	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure they have access <input type="checkbox"/> Answer any questions they have
<input type="checkbox"/> Ensure participation/registration in N.E.W. days	<ul style="list-style-type: none"> <input type="checkbox"/> Check on timing of first session if not yet occurred <input type="checkbox"/> Inquire how it went if attended
<input type="checkbox"/> Discuss G.O.A.L. process for performance planning, assessment and development	<input type="checkbox"/> 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
<input type="checkbox"/> Conduct a performance dialogue and review with the employee their performance objectives, standards if available, and expectations	<input type="checkbox"/> These are captured on the Performance Dialogue worksheet; both the Supervisor and Employee should keep a copy and review periodically
<input type="checkbox"/> Discuss relevant job rules and regulations	
<input type="checkbox"/> Check in on buddy	<ul style="list-style-type: none"> <input type="checkbox"/> Talk with buddy if appropriate <input type="checkbox"/> Talk with new employee about buddy relationship if appropriate
<input type="checkbox"/> Discuss learning and development policies and procedures	
<input type="checkbox"/> Additional	<input type="checkbox"/> <input type="checkbox"/>
Employee's First Three Months	
<input type="checkbox"/> Ensure continued participation in N.E.W. @ the U Activities and Training	Answer their questions and help foster engagement with the organization
<input type="checkbox"/> Performance conversation	<ul style="list-style-type: none"> <input type="checkbox"/> Can be informal <input type="checkbox"/> Let employee know how they are doing <input type="checkbox"/> Ask questions
<input type="checkbox"/> Additional	<input type="checkbox"/> <input type="checkbox"/>
Employee's First Six Months	
<input type="checkbox"/> Ensure continued participation in N.E.W. @ the U Activities and Training	
<input type="checkbox"/> Conduct performance assessment (mid-year review) using G.O.A.L.	<ul style="list-style-type: none"> <input type="checkbox"/> More formal <input type="checkbox"/> Document for probation purposes
<input type="checkbox"/> Revisit performance objectives and revise if required	
<input type="checkbox"/> Check in with questions	
<input type="checkbox"/> Additional	<input type="checkbox"/> <input type="checkbox"/>

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After Probationary Period	
<input type="checkbox"/> Celebrate end of probationary status	
<input type="checkbox"/> Schedule annual performance review	
<input type="checkbox"/> Additional	<input type="checkbox"/> <input type="checkbox"/>