

New Employee Onboarding Checklist (For Supervisor)

Supervisor's Name:

Employee's Name:

Pre-Arrival:

- Call to officially welcome employee after confirmation of acceptance
- Clarify start date and time and other details for remote or onsite setup
 - If onsite, set up the work area as needed (check that phone and computer connections are in place, provide stationary supplies, etc.)
- Remind employee to complete all onboarding tasks in Workday before their 1st day
- Send introduction email to department
 - Beforehand, ask employee to [share his/her/their pronoun](#)
- Organize employee's 1st week
 - Setup meetings with necessary staff and training
- Prepare introductory period performance plan and a copy of the PIQ (job description)
 - Coral Haas or Kristine Chin can provide you with a PIQ copy if needed
- Plan meaningful initial work assignments that set employee up for success to establish a pattern for productive collaboration

First Day:

- If onsite, conduct tour of department, break rooms, copy/fax location, restrooms, mail room, office supplies, and emergency assembly points
 - Direct employee to the [PennCard Center](#) to get an ID card
- Ensure employee have what they need in terms of equipment and access, and connect them with GSE IT if needed
- Introduce employee to the team and relevant colleagues across GSE
- Provide the week's agenda and discuss
 - Schedule should include a balance of time with others, down time, and time to review Penn's sites and policies/procedures

First Week:

- Set aside dedicated time to discuss the following:
 - Department mission and strategic plans
 - Organization of department (share staff and faculty contact list)
 - Job description, responsibilities, and performance expectations
 - [Penn Profiler](#) and [Knowledge Link](#) trainings
 - Introductory period performance plan and performance management system

- Important University policies, such as [Acceptable Use of Electronic Resources](#), [Suspension of Normal Operations](#) and [Conflict of Interest](#)
- Share calendars, monthly staff meeting dates, and any other relevant events
 - Schedule weekly or bi-weekly one-on-one meetings with employee
 - Ensure employee is scheduled for GSE HR's new employee orientation (GSE HR will email calendar invite)
- Ask employee to upload a headshot into Outlook
- Monitor employee's engagement and success and check in frequently
 - Continue to clarify roles, responsibilities, and expectations as needed

Month One-Four:

- Arrange introductory meetings for employee with department head and other team members that employee may work together with
- Pair employee with a mentor or peer within the department
- Share opportunities for employee to integrate with the School and University community (WPPSA, PPSA, HEARD, etc.)
- Share unwritten rules, nuances, workplace dynamics, and traditions
- Ensure mandatory trainings have been completed and identify any additional access or specific training needed
 - Discuss professional associations and memberships, if applicable
- Provide ongoing feedback to employee
 - Meet at 30 and 60 days to review observations, issues and priorities
 - Continue to clarify roles and responsibilities as needed, and answer questions and concerns
- Conduct [introductory performance review](#) and set new goals for the rest of the year
 - Consult with [GSE HR](#) in advance of completing the plan if the employee will not be retained or introductory period will be extended

Ongoing

- Meet regularly to discuss experiences and how they match employee's expectations\
- Celebrate successes and employee's contributions with private and/or public recognition
- Provide guidance and regular feedback to employee to ensure continued success and career development at the University, adjusting goals if necessary
- Complete annual review and merit increase process
- Discuss and develop professional development opportunities including training, projects, conferences, mentoring, and committee involvement