

DEPARTMENT ON-BOARDING CHECKLIST

Please check the box after an item has been completed. You can also add the date of completion next to it. The list below contains information and activities that your department may want to cover with the new employee during the department on-boarding process.

New Hire Name:	Job Title:
Start Date:	Department:
Supervisor:	Completed by:

Date:

BEFORE DAY 1:

- Work with Human Resources to track new employee through the hiring process.
- Submit the [Hiring Proposal](#) via PeopleAdmin or an ePAF/cPAF through the online ePAF portal. Click [here](#) to locate the ePAF link and log in with your UTRGV credentials to initiate this process. To refer to the ePAF manual, please click [here](#).
- Call and welcome new employee before first day and confirm start date, time, location, parking instructions, and dress code. Convey how excited you are for their arrival.
- Notify your team that a new employee will be arriving soon.
- Secure a work area, set up office space with supplies, computer, phone, and initiate key request.
- Assign and communicate new hire departmental contact or mentor.
- Prepare a welcome packet from the department and include: job description, contact names and phone lists, department mission and vision, expectations.
- Prepare new hire's 1st week tentative agenda and add regularly scheduled meetings.
- If possible, plan to meet your new hire on his/her first day at the office, if not available, arrange with New Hire Departmental Contact.

FIRST DAY AT THE OFFICE

- Be available to greet the employee on the first day at the office.
- Meet with new hire to cover:
 - Welcome packet and first week agenda.
 - Go over the new hire's job description, duties and expectations.
 - Discuss departmental procedures regarding probationary period, time off, unexpected absences, dress code, work schedule, lunch and break rules, and training.
 - Introduction to co-workers and department tour.
 - Ask what name the new employee prefers to go by.
 - Introduction to mentor/department contact and discuss 1st week expectations.
 - Ask what they learned at New Employee Orientation and if they have any additional questions.

DEPARTMENT ON-BOARDING CHECKLIST

Date:

- Ensure information is correct (hire date, direct supervisor, email, cell # etc.)
- Ensure new hire has access to UTRGV email account and resources i.e. computer, phone, wifi, vpn, etc.
- Remind employee to complete mandatory assigned compliance trainings within 30 days of hire. New hire should receive an email from compliance that trainings were assigned.
- Remind employee to access PeopleSoft Employee Self Service to complete their W-4, direct deposit and personal information, and nepotism acknowledgement. Instructions on updating the University Directory information can be found [here](#).
- Remind employee to buy parking permit online.
<https://utrgv.t2hosted.com/Account/Portal>
- Take employee on a campus and department tour:
 - Introduce to staff
 - Building access times
 - Common spaces/meeting rooms
 - Bathrooms
 - Emergency exits and procedures
 - Copy machine, printers
- Remind employee to obtain employee ID card (if not obtained during NEO)
- Make sure new hire completed all required HR paperwork and I-9
<https://www.utrgv.edu/hr/organizational-development-training/on-boarding/index.htm>
- Add new hire to regular team meetings

DAY 30

- Assess employee progress and needed equipment, professional development, accesses.
- Ensure mandatory compliance trainings are completed on or before 30 days of employment.
- Schedule and conduct regularly occurring one-on-one meetings.
 - Share stories with new employee. Stories recount past situations, events, and experiences that can be used as learning tools. Stories can exemplify organizational values, bring to life why certain practices exist, and illustrate achievements.
 - Show the employee how he/she fits into the “big picture”.
- Create opportunities for the employee to interact with other employees.
- Encourage colleagues to invite the new employee to partake in campus activities.
- Check if they need assistance completing their first time card.
- Share Graphic Identity Guidelines <https://www.utrgv.edu/umc/creative-services/graphic-identity-guidelines/index.htm>

DEPARTMENT ON-BOARDING CHECKLIST

Date: **DAY 60**

- Continue to meet with employee regularly to provide performance feedback. Continue to check in at least once a week. A check in can occur in person or over the phone.
- Let them share new ideas the employee may have. Give the new employee a chance to integrate and capture their ideas.
- Remind the employee to sign up for VAQUEROS Culture of Service Excellence Training.

DAY 90

- Explain the annual performance review and goal-setting process. Provide performance feedback. Meet for 90 day performance appraisal review with new hire and keep feedback documentation in employee's department file. [Appraisal Resources](#)
 - Provide honest feedback regarding employee's progress.
 - Identify the training and development activities for the next 6 months.
 - Check our [training portal](#) for upcoming trainings and select & assign appropriate E-Learn Trainings <http://www.utrgv.edu/hr/organizational-development-training/index.htm>

DAY 120

- Continue to provide timely, on-going, meaningful feedback.
- Notify HR Employee Relations (HR Business Partners) if you have concerns about employee's performance, attendance or conduct.
- Continue to meet with new employee regularly.

DAY 150 - 180

- Complete 150 day performance appraisal. Review progress on performance goals and professional development goals.
- Probationary period ends after 180 days as defined by the HOP ADM 4-504.
- Continue to meet with employee periodically.

1 Year

- Celebrate successes and recognition of employee's contributions.
- Think of creative ways to keep your employees engaged.
- Continue providing regular feedback.
- Keep encouraging professional development.