

New Employee Onboarding Checklist for Student Affairs Staff



Employee's First Name and Last Name:	Supervisor:	Start Date:
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Use this checklist as a guide to help you successfully prepare the new employee prior to their start date so that they can have a successful onboarding. According to Aberdeen Group, great onboarding claims a higher rate of successful assimilation of new hires into company culture, higher time-to-productivity ratios, and an overall higher employee engagement level, all of which are linked to better retention rates.

	TASK	INFORMATION AND RESOURCES	TASK LEADER	TIMELINE
	Notify new employee of job offer	Recruiter provides offer letter to new employee (with hiring manager signature) after Manager and HR Rep approval.	Manager, HR Rep, Recruiter	Prior to start date
	Notify Human Resources of hire	Create BIZeBEARS ticket to request to hire employee with attached offer letter, resume, job description, and contract (if applicable)	HR Rep	Prior to start date
	Welcome call or e-mail to new employee	Contact new employee prior to first day: <ul style="list-style-type: none"> • Communicate personal value and serve as contact for information or concerns • Provide information on work site (directions, dress, and accommodations) • What to expect for first day, orientation activities, and links to relevant info 	Manager	After offer letter is signed
	Employee supplies, office, access	Arrange for new employee to have: <ul style="list-style-type: none"> • Appropriate computer/software & network access at workstation for first day • Clean workspace with supplies including name badges and name plates • Welcome banner in new employee's space • Keys, keypad codes, and building access codes as needed • Background check scheduled with UCPD on employee's first or second day 	Manager	Prior to start date

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	Notify department, SA, and functional groups of new employee	Ask employee to send bio and photo for email announcement and/or website. Send an announcement of new hire to all relevant internal groups and campus partners	Manager	Prior to start date (1 week)
	Onboarding buddy selection	Select a peer mentor/onboarding buddy. A mentor must be a strong performer, a good communicator, and someone who demonstrates pride, trust, and community	Manager	Prior to 1st day
	Systems access and training	Arrange for access and training to relevant tools and systems. Examples: (Active Directory, Star Res, bCal, Oscar, Universe, etc.)	Manager	Prior to 1st day
	Employment paperwork and orientation	HR Rep does the following: <ul style="list-style-type: none"> • Emails new employee welcome email with paperwork and benefits information • Issues CalNet token • Schedules new employee for employment paperwork and orientation • Makes DMV records request (if applicable) 	HR Rep	Prior to/during 1st day
	Job duties documentation	HR Rep sends new employee job description and Physical, Environmental, and Mental Demands (PEM) form for review and signature.: <ul style="list-style-type: none"> • Have employee sign job description and PEM, and return to HR Rep. • Have employee review and sign the confidentiality agreement 	New Employee, HR Rep, Manager	Prior to/during 1st day
	Overview of employee services	Direct new employee to relevant training and employee services: <ul style="list-style-type: none"> • UCB Learning Center • Sexual Harassment Prevention training • Ethics training • SA Community Blog • Wisdom Cafe Social Learning Community • Ombuds Office • OHR Employee Relations • Campus Shared Services-Human Resources • University Health Services - Tang Center • Be Well at Work - Faculty/Staff Health Programs • Whistleblowers 	Manager, HR Rep	Prior to/during 1st day

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	Obtain Cal ID Card and Parking & Transportation permit or transit passes	<ul style="list-style-type: none"> Bring employee ID number and photo identification (current driver's license, state ID, passport, etc.) to the Cal 1 Card office to obtain a Cal ID and/or CalNet token (9am-5pm, M-F, 180 César Chávez Center, Lower Sproul) Go to Parking & Transportation office to get parking permit or transit passes Review Wage Works commuter benefits 	New Employee	1st day
	Tour of workspace and office equipment	Provide new employee with tour of workspace and relevant sites on campus and use of office equipment	Manager	1st day
	WarnMe Emergency Alert Service/go bag	Sign up for WarnMe - UC Berkeley's Emergency Alert Service & provision a "go bag" for emergency	Manager	1st day
	Listservs	Request to add employee to applicable internal list serves and shared drives with SAIT <ul style="list-style-type: none"> Explain listservs to employee 	Manager	1st day
	Ergonomic review	Contact Business Operations to schedule workstation ergonomic assessment	SA Ergo Rep	1st day
	Work procedures	Clearly communicate what is expected at work and describe relevant work procedures <ul style="list-style-type: none"> Procedure for notification for time off/sick leave Work hours and schedule Steps to resolving problems and conflicts CalTime 	Manager	1st week
	Orientation to departmental units	Schedule orientation sessions for new employees with key managers in the department to provide high-level overview of various units.	Manager	1st week
	Staff meetings	Add staff meetings to bcal or add new employees to department and division events	Manager	1st week
	New employee training	Design onboarding schedule and identify needed outside and/or departmental trainings for new employee. (Example: FERPA, bConnected Suite, Service Now)	Manager	1-2 weeks
	Campus amenities	Provide information on campus amenities: access to libraries, museums, performances, Recreational Sports Facility, wellness programs	Manager	1-2 weeks

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	Mission, Vision, Values	Review department mission, vision, values, goals, and organization charts	Manager	1-2 weeks
	Performance expectations, evaluation methods, and probationary period	Set a clear structure for feedback. Along with a clear job description and PEM, provide the employee with clear performance expectations and objectives so the employee understands what is expected and how they will be measured. Discuss the probationary period (manager places a calendar request for 3 month and 6 month)	Manager, Employee	1-2 weeks
	Business cards	Assist new employee in selecting and ordering business cards	Manager	1-2 weeks
	Safety & emergency	Review safety and emergency preparedness: <ul style="list-style-type: none"> • Review building evacuation plan (provide copy if applicable) • Describe role in business resumption (if applicable) • Review Injury and Illness Prevention Plan (IPP) (provide copy) • Review appropriate safety information 	Manager	1-2 weeks
	General overview	Review the following information with the new employee: <ul style="list-style-type: none"> • Student Affairs Vision, Mission, Values • Principles of Community • Statement of Ethics • Go Forth, Go Bears New Employee Onboarding Series • Go Big Staff Strategic planning Initiative 	Manager, Employee	1-2 weeks
	Policies overview	Review department and campus policies and procedures and websites: <ul style="list-style-type: none"> • Family Educational Rights and Privacy Act (FERPA) • Vehicle Stewardship policies • Sexual Harassment and Violence policy • Policy/Bargaining Agreement website (if applicable) • Alcohol and Drugs policy 	Manager	1-2 weeks
	Networking calendar	Set up networking meetings for new employee to meet staff and campus partners. Get everyone on the same page about developing the new employee. Employees develop best through relationships with others and the more supportive the relationships, the more new employees will feel welcomed and valued as members of the organization.	Manager	1 month

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GoForth Go Bears New Employee Onboarding Series	Register employee for Go Forth Go Bears New Employee Onboarding Series	Manager	1 month
UCB New Employee Orientation	Assist employee to register for UC Berkeley New Employee Orientation through the UC Learning Center	Manager	1-3 months
Schedule three month performance review	Evaluate the employee's performance is accordance with applicable policies, procedures, and contracts. This should be done in writing	Manager	3 months
Schedule six month performance review	Evaluate the employee's performance is accordance with applicable policies, procedures, and contracts. This should be done in writing	Manager	6 months
Create individual professional development plan	Create individual professional development plan. Discuss how employees can use their strengths and put them to work right away by giving workers opportunities to do their best.	Manager	6 months
Additional			
Additional			
Additional			
Additional			

I have reviewed and successfully completed all information in this checklist.

Employee Signature: _____ Employee Name _____ Date: _____

Manager Signature: _____ Manager Name _____ Date: _____

updated on July 8, 2016 by Erin Wixson

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Notes: