**New Employee Onboarding Checklist**

***Onboarding*** is a long-term process that begins with the acceptance of the offer letter and continues for at least six months to a year (to how ever long a particular role / employee requires). A key element of onboarding is the supervisor taking ownership and creating opportunities for the new employee build: proficiency of skill, relationships (e.g., with supervisor, peers, customers, etc.), and sense of belonging to the NKU community.

This checklist provides guidance with the process of onboarding and assists with creating a great experience for the new employee.

***Note***: A huge consideration is how the employee will be working (e.g., in the office vs remote, staff vs faculty, full-time vs. part-time, exempt vs. non-exempt). While this checklist is relatively comprehensive, it is not all-inclusive and may need additional elements added for that great experience.

|  |  |  |
| --- | --- | --- |
|       |       |       |
| **Employee’s Name** | **Title** | **Start Date** |
|       |       |       |
| **Supervisor Name** | **Title** | **Department / Area** |

The new employee will be working as: (check all that applies)

In the office [ ]  Remote [ ]  Staff [ ]  Faculty [ ]

Full-time [ ]  Part-time [ ]  Exempt [ ]  Non-Exempt [ ]

New to NKU [ ]  New Role [ ]  New Supervisor [ ]

**Note for Supervisor:**

* Your new employee is relying on you (or your designee) to have available all the tools and resources necessary to be successful on their first day with NKU.
* You can use this checklist as your tracker to ensure all elements are in place (and on the radar, if effective at a later date) with responsible party, date, and indication of completion.
* Any items on this checklist that do not apply should be marked “N/A”.
* Be sure that the employee has been oriented and understands expectations.
* Retain completed and signed checklist as part of the employee’s record. (Recommendation: Save the copy in [*TalentED*](file:///%5C%5Cfileserv3.hh.nku.edu%5CDepartments%24%5CHuman%20Resources%5CMarquita%5COnboarding%5CTemplates%5Ctalented.nku.edu) as an attachment to the employee’s performance record.)

**Note for New Employee:**

* You are responsible for actively participating in the learning of your role and seeking clarification, when needed, to ensure understanding of the protocols and expectations of your role.
* You are to sign this form as an acknowledgment of your orientation and understanding of the protocols and expectations of your role.
* Note that this checklist but a guide and is not meant to be an all-inclusive list for your onboarding.

**Employee Signature of Acknowledgement & Date** 

 Any questions, please contact Human Resources via email - hr@nku.edu.

**New Employee Onboarding Checklist**

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Arrival – Supervisor or Designee** | **Onboarding Element** | **Date Initiated / To Start** | **Initials of Completion** |
| Confirm offer letter was sent to and accepted by the selected candidate. (FYI: Most departments send their own offer letters unless they ask Human Resources to do so.) |  |  |
| Call to officially welcome the new employee to NKU, after confirmation of acceptance, and provide contact information and overview of first day, including start date and work hours.* Working on-campus: Also –
	+ Share where to park and report for their first day and who to ask for, if different than supervisor.
	+ Inform employee of welcome luncheon and ask if any food preferences, if catering lunch for their first day.
 |  |  |
| Complete all required paperwork for the new employee (e.g., PAR, contract, etc.); Refer to the **HR Paperwork Process** webpage by clicking [HERE](https://inside.nku.edu/hr/employment/hiring-process/hr-virtual-process-plans.html). (*Note for Faculty*: credentialing is important.) |  |  |
| Arrange workplace/workstation access and setup:* Logon information, including remote access
* Keys (e.g., building, office, etc.)
* Computer / Systems
* Shared drives, Teams, Internet, etc.
* Email / Team Calendar
* Phone / Voicemail & Passcode / Fax
* Printer
* Supplies / handbook / etc.
* Support buddy / point person

***Note*: Do something special! If working**:* On-campus: Do something special for their workspace.
* Remote: Mail a special note / treat.
 |  |  |
| Arrange a welcome meal between you and the new employee for their first day.***Note***: Be sure to add as meeting invite for the new employee; Include any team members or others on invite, if group / team luncheon. |  |  |
| Send an email to the department announcing new employee with start date and short bio. |  |  |
| Create an onboarding schedule; May refer to the ***New employee Goals, Orientation & Training Schedule / Template*** located on the **New Employee Welcome Center** [website](https://inside.nku.edu/hr/traininganddevelopment/newemployeewelcomectr.html) by clicking [HERE](https://inside.nku.edu/content/dam/humanresources/docs/employeedevelopment/New%20Employee%20Goal-Orientation-Training%20Template%20-%20Final.pdf). |  |  |
|  | * Email the employee a copy of this checklist, so that they can access the links, where applicable; **highly encourage the employee, if possible, to complete their Human Resources (HR) paperwork and other requirements prior to their first day**.
* Also, setup 1x1 meetings and include employee on any team and applicable meetings at the end of each week for the first 30-days of employment.
 |  |  |

**New Employee Onboarding Checklist**

| **New Employee First Day!** | **Onboarding Element** | **Responsible Party(ies)** | **Initials of Completion** |
| --- | --- | --- | --- |
| Complete any outstanding HR paperwork (e.g., I-9, etc.) by going to the Lucas Administrative Center, 7th floor; Refer to the **HR Paperwork Process** webpage by clicking [HERE](https://inside.nku.edu/hr/employment/hiring-process/hr-virtual-process-plans.html). | Employee |  |
| Obtain All Card from the All Card Office. | Designee and Employee |  |
| Obtain permanent parking permit from the Parking Office near the top level of the Welcome Center Garage. | Designee and Employee |  |
| **Departmental Onboarding** |  |  |
| Show employee to their workstation / desk; Allow them to put any belongs away and to settle for a moment. | Supervisor / Designee |  |
| Introduce to co-workers.* Remote: Arrange 15- to 30-minute virtual meeting at the beginning of the day.
 | Supervisor / Designee |  |
| Provide tour of department (e.g., place to hang coat, restroom, vending / breakroom, office supplies, emergency locations, etc.). | Supervisor / Designee |  |
| Communicate job expectations and review /discuss:* Brief overview of this checklist and orientation / training plan.
* Importance of completing the [New Employee Online Orientation](https://nku.instructure.com/enroll/BHKT8X) and Compliance training. (Email will come from Vector Solutions about the compliance training.)
	+ Highlight any University policy of significance (e.g., [Performance Expectations and Corrective Action](https://inside.nku.edu/content/dam/policy/docs/Policies/PerformanceExpectationsCorrectiveAction.pdf), [Dress Code](https://inside.nku.edu/content/dam/policy/docs/Policies/Dress%20Code.pdf), etc.)
* Departmental mission, values, goals, policies and procedures, structure and functions, emergency plan, operating hours and work schedule, and vacation. (Also, expense and budget reports, if necessary for role.)
* Job responsibilities, competencies, and expectations.
* 90-day probationary period and annual review processes.
* Confirm all paperwork with HR has been completed.

***Note: Take note of non-exempt employees, especially around work hours and overtime.*** | Supervisor |  |
| Provide computer and equipment orientation at desk (e.g., sign-in, access to drives on network, email, websites, phone (as well as voicemail and passcode), printer, etc.). | Supervisor / Designee |  |
| Activate NKU email account online at <https://password.nku.edu/>. | Employee |  |
| Facilitate the new employee (1x1 or team) welcome luncheon.* Remote: You may elect to have a virtual team luncheon.
 | Supervisor / Designee |  |
| Review the information provided thus far, and take time to form any questions that you would like to ask about your role / work, the department, or the University. | Employee |  |

**New Employee Onboarding Checklist**

| **New Employee First Week!** | **Onboarding Element** | **Responsible Party(ies)** | **Date Initiated / To Start** | **Initials of Completion** |
| --- | --- | --- | --- | --- |
| Be sure to check your tax information, as well as add any beneficiaries you would want covered on your benefits, add emergency contacts, sign-up for direct deposit, and update online directory, via <https://mynku.nku.edu/> under Employee.  | Employee |  |  |
| Access NKU’s **New Employee Welcome Center** – by clicking [HERE](https://inside.nku.edu/hr/traininganddevelopment/newemployeewelcomectr.html); then complete the **New Employee Online Orientation** – by clicking [HERE](https://nku.instructure.com/enroll/BHKT8X). | Employee |  |  |
| Provide tour of campus and other work locations (e.g., conference rooms, classrooms, etc.).* Remote: Provide information and access to any discussion boards, meeting rooms, etc.
 | Supervisor / Designee |  |  |
| Introduce to other departments and customers.* Remote: Arrange 15- – 30-minute virtual meetings.
 | Supervisor / Designee |  |  |
| Begin work on the training plan, which includes any compliance training for the role. | Designee and Employee |  |  |

| **New Employee First Month!** | **Onboarding Element** | **Responsible Party(ies)** | **Date Initiated / To Start** | **Initials of Completion** |
| --- | --- | --- | --- | --- |
| Attend the Benefits orientation meeting. (You will receive an email invite.) Takes place every 2nd and 4th Tuesday of the month at 10:30 AM.) | Employee |  |  |
| Complete the benefit enrollment process within the first 31 days of hire date. | Employee |  |  |
| Attend the New Employee Welcome and/or Networking Events. (You will receive an email invite.) | Employee |  |  |
| Complete the required New Employee 30-, 60-, 90-Day **Compliance Training** that’s been assigned. (You will receive an email from Vector Solutions, which will give you access to the courses.)***Note: You may elect to just complete the 30-Day course for now or complete all three. Be sure to complete the 60-Day course by the second month of employment.*** | Employee |  |  |
| Continue work on the training plan, which includes any compliance training for the role. | Designee and Employee |  |  |
| Review the purchase request process. | Employee |  |  |
| Review current state of performance and level of meeting expectations and update as part of feedback within TalentED (learning and performance management system) as part of a 30-day review. | Supervisor |  |  |

**New Employee Onboarding Checklist**

| **New Employee First 90 Days!** | **Onboarding Element** | **Responsible Party(ies)** | **Date Initiated / To Start** | **Initials of Completion** |
| --- | --- | --- | --- | --- |
| Attend the New Employee Welcome and/or Networking Events. (You will receive an email invite.) | Employee |  |  |
| Complete your last required New Employee 90-Day **Compliance Training**.***Note: If you have not had a chance to complete the 30- or 60-Day courses, please be sure to complete all at this time.*** | Employee |  |  |
| Continue work on the training plan, which includes any compliance training for the role.***Note: If training is complete, determine if there is any additional task or activities needed for the onboarding experience.*** | Designee and Employee |  |  |
| Collaborate on the frequency of 1x1 meetings and who will setup of those meetings. | Supervisor and Employee |  |  |
| Order any business cards, name plate, etc. | Designee and Employee |  |  |
| Review how to access a pay stub and W2 and W-4 forms, record work time and time off, create travel request, etc. by clicking [HERE](http://mynkuhelp.nku.edu/). | Employee |  |  |
| Perform a 90-probationary review.**Staff Only**: Refer to [*TalentED*](file:///%5C%5Cfileserv3.hh.nku.edu%5CDepartments%24%5CHuman%20Resources%5CMarquita%5COnboarding%5CTemplates%5Ctalented.nku.edu) (learning and performance management system) to complete the 90-day probationary process. (More information can be found on the [*Staff Performance Evaluation Process*](https://inside.nku.edu/hr/traininganddevelopment/staffperformeval.html) website.) | Supervisor and Employee |  |  |
|  | Determine if employee is ready for project work, if applicable. | Supervisor |  |  |

| **New Employee First 6 Months!** | **Onboarding Element** | **Responsible Party(ies)** | **Date Initiated / To Start** | **Initials of Completion** |
| --- | --- | --- | --- | --- |
| Attend the New Employee Welcome and/or Networking Events. (You will receive an email invite.) | Employee |  |  |
| Continue work on the training plan, which includes any compliance training for the role.***Note: If training is complete, determine if there is any additional task or activities needed for the onboarding experience.*** | Designee and Employee |  |  |
| Perform mid-year or year-end performance review, whichever is applicable and available in [*TalentED*](file:///%5C%5Cfileserv3.hh.nku.edu%5CDepartments%24%5CHuman%20Resources%5CMarquita%5COnboarding%5CTemplates%5Ctalented.nku.edu) to complete.Email HR if any questions via hr@nku.edu. | Supervisor and Employee (and 2nd Level Supervisor) |  |  |
| Determine if employee is ready for project work, if applicable and was not previously assigned. | Supervisor |  |  |

**New Employee Onboarding Checklist**

| **New Employee First Year!** | **Onboarding Element** | **Responsible Party(ies)** | **Date Initiated / To Start** | **Initials of Completion** |
| --- | --- | --- | --- | --- |
| Attend the New Employee Welcome and/or Networking Events. (You will receive an email invite.) | Employee |  |  |
| Continue work on the training plan, which includes any compliance training for the role.***Note: If training is complete, determine if there is any additional task or activities needed for the onboarding experience.*** | Designee and Employee |  |  |
| Perform annual/year-end performance review.**Staff Only**: Refer to [*TalentED*](file:///%5C%5Cfileserv3.hh.nku.edu%5CDepartments%24%5CHuman%20Resources%5CMarquita%5COnboarding%5CTemplates%5Ctalented.nku.edu) (learning and performance management system) to complete the year-end process. (More information can be found on the [*Staff Performance Evaluation Process*](https://inside.nku.edu/hr/traininganddevelopment/staffperformeval.html) website.) | Supervisor, Employee, and 2nd Level Supervisor |  |  |
| Determine if employee is ready for project work, if applicable and was not previously assigned. | Supervisor |  |  |
|  | Collaborate on growth/development plan and enter into [*TalentED*](file:///%5C%5Cfileserv3.hh.nku.edu%5CDepartments%24%5CHuman%20Resources%5CMarquita%5COnboarding%5CTemplates%5Ctalented.nku.edu). | Supervisor and Employee |  |  |
|  | Provide feedback about the onboarding experience to the supervisor and by completing the assigned evaluation within [*TalentED*](file:///%5C%5Cfileserv3.hh.nku.edu%5CDepartments%24%5CHuman%20Resources%5CMarquita%5COnboarding%5CTemplates%5Ctalented.nku.edu). | Employee |  |  |