UNIVERSITY of VIRGINIA

ACADEMIC STAFF: NEW HIRE ONBOARDING CHECKLIST
Manager and/or Designee Responsibilities

INTENTION OF THE ONBOARDING CHECKLIST TASKS

Cultural Immersion	• Delivers an inspiring welcome that helps reinforce the new hire's decision. • Provides the new-hire with a sense of organizational norms and values and an understanding of how we became who we are today
Engagement	• Helps new hire see the connection between their role and the mission. • Assists in the building of interpersonal relationships and information networks. • Builds excitement about being part of something great. • Offers a seamless and positive process, decreasing frustration and increasing trust and satisfaction. • Increases retention and engagement.
Clarification	• Provides a consistent approach and key messaging to educate regarding UVA's priorities, vision, strategy, practices and standards. • Ensures an understanding of their job and all related expectations; where they fit into the bigger picture; and what they need to do to complete their onboarding, in order of priority. • Decreases ramp-up time/time-to-productivity and frustration by others handholding and trouble-shooting.
Compliance	• Teaches new hires the basic legal and policy related rules and regulations for the University, department and the role. • Assures completion of compliance/regulatory requirements.

MANAGER CHECKLIST

New Hire's Name:	
Start Date:	
PHASE	PRE-BOARDING - Prior to hire date
Completed ✓ or N/A	
	Announce to team and others, as needed, the new hire and their start date
	Notify departmental or ITS contact of need for phone and phone number (or transfer from former number) and/or mobile device (if applicable)
	Schedule departmental or ITS contact for equipment/system configurations (e.g. Printer access, etc.)
	Prepare office space and/or locker, supplies and equipment/uniform
	Schedule welcome celebration and departmental overview - History, current state, future direction.
	Assign a team member to assist with welcome and assimilation
	Order necessary keys and/or necessary office/facility accesses from appropriate departmental contact
	Prepare calendar/schedule for their first weeks (include initial departmental/University meetings, weekly manager & mentor check-in appointments, and if appropriate, key customer get-to-know you meetings)
	Prepare/provide necessary departmental reference or resource materials (links, toolkits, etc.) on USB drive, server folder or printed

	Send Resources/Links with information about local area (housing, schools, things to do), if new to area (i.e. Charlottesville: www.charlottesville.org/visitors)
	Call new hire to continue welcome process and to confirm, remind or inform them of: • standard start time • confirm expectation to attend in-person orientation (HR schedules and includes orientation details on offer letter), and inform new hire of where they should go after orientation • parking options and parking office location www.virginia.edu/parking • schedule for their first weeks • complete section 1 of the I-9 Form online (if external hire) www.hr.virginia.edu/other-hr-services/CIS/i-9-online-page/i-9-online-for-employees • department/school's safety & security policies & procedures, dress code/uniform • work hours, pay frequency, overtime pay if applicable And obtain emergency contact information
	Stock new hire's office and/or locker with necessary equipment or supplies
	Order business cards (if applicable) by submitting an order to UVA Printing & Copying Services https://uvaprint.virginia.edu/
	Order office nameplate (if applicable) by submitting a Service Request to Facilities Management www.fm.virginia.edu/ServiceRequest
	Create departmental welcome packet for new hire (i.e. logo folder, brochures, personal note, logo gift)
	Add new hire to necessary departmental communications (email lists, phone directories, websites)

PHASE	ORIENTATION – First Days
Completed ✓ **or N/A**	**First Days**
	Manager or designee - greet new hire on Day 1 (take new hire to lunch if feasible)
	Ensure new hire attends orientation. Contact HR Representative if unsure of details.
	Ensure I-9 completion (if external hire) www.hr.virginia.edu/other-hr-services/CIS/i-9-online-page/i-9-online-for-employees
	Provide overview of department/school/unit/VP area
	Provide departmental/school organizational chart overview
	Review schedule/calendar of onboarding activities and meetings
	Provide/review the departmental resource/reference guide materials (located on server folder, USB or printed)
	Tour department/school/unit – work spaces, supplies, social spaces
	Introduce to team and key constituents
	Ensure new hire obtains: • University ID www.virginia.edu/idoffice on first day • parking permit www.virginia.edu/parking on first day • identity token/i-key (if applicable) http://its.virginia.edu/identity/token/home
	Ensure/share IT Configurations and Access (cannot be done without University ID) • computer set-up and Identity Token/I-Key (if applicable) • email • phone and mobile devices (if applicable) • server and website accesses • ESHARP access, if needed http://its.virginia.edu/esharp • departmental phone list • review IT support/help process
	Notify employee of emergency alert registration http://uvaemergency.virginia.edu/uva_alerts

	BY THIRD DAY
	Ensure Part 2 of I-9 is completed with Human Resources (if external hire)
	Departmental welcome event occurs
	Share timekeeping instructions
	Explain probationary process http://uvapolicy.virginia.edu/policy/HRM-020

PHASE	ONBOARDING CONTINUED - First Week – 2 Months
Completed ✓ or N/A	

	Engagement
	Review departmental communication structure, procedures and opportunities
	Discuss University and Department/School culture and "lingo" (e.g. Grounds)
	Review social media, newsletters, newspapers, email distribution lists, committees
	Discuss completed New Hire Personal Interest Profile; share your (the manager's) personal story/interests

	Cultural Immersion
	Discuss Department specific benefits/activities
	Discuss Hoo's Well Program www.hr.virginia.edu/other-hr-services/hooswell and department support/options for wellness (flextime, facility accesses, etc.)
	Discuss university professional development opportunities (i.e. classes, education benefit) http://leadershipexcellence.virginia.edu, www.hr.virginia.edu/hr-for-you/university-staff/university-staff-benefits/education-benefits
	Discuss departmental/school professional development opportunities/philosophy (if applicable)
	Community overview if new to area (i.e. Charlottesville www.charlottesville.org)

	Compliance / Competency / Training
	Compliance of Federally regulated and required trainings required for all employees and for specific role
	Share competencies important to the position/team
	Completion of Orientation eLearning Modules: Getting Paid & Taking Leave, Benefits, Policies & Standards, Safety & Security http://leadershipexcellence.virginia.edu/grounds-success-orientation
	Training specific to department/school or role
	Enroll in most appropriate leadership group learning program, if appropriate
	Review departmental leave request procedures and explain exempt/non-exempt status
	Holiday schedule www.hr.virginia.edu/calendars/university-holiday-schedule
	Employee Self-Service, including recording of time and/or leave www.hr.virginia.edu/hr-for-you/faculty/employee-self-service
	Review departmental inclement weather policy/procedures
	Review departmental emergency protocol and procedures http://uvaemergency.virginia.edu
	• Evacuation and Shelter in Place procedures
	• Safety processes, including locating fire pull stations and fire extinguishers
	• Designation status (i.e. designated or non-designated for snow storm delays or closures) www.hr.virginia.edu/event-status
	• Accident injury procedures www.hr.virginia.edu/uploads/documents/media/Employee_Checklist_for_Workers.pdf

	• Emergency blue phones on Grounds (Dial 9+911)
	• Universal precautions and HAZMAT (if applicable)
	• Safety Data Sheets (if applicable)
	Review Code of Ethics www.virginia.edu/statementofpurpose
	Review confidentiality and privacy expectations
	Clarification
	Review job description
	Review administrative and/or managerial responsibilities and leadership role/expectations
	Answer questions regarding role, procedures, mission
	Provide additional support/guidance/resources if/where necessary (software programs specific to role, etc.)
	Provide broad overview of ongoing coaching and feedback philosophy and annual performance review process and system
	Discuss goals and evaluation: Clearly define what success looks like. Discuss a combination of short-term and long-term goals that will give them a sense of accomplishment and lasting impact. Explain ways you, the manager, will support their success.
	Have new hire record their goals in Lead@ www.hr.virginia.edu (see "Performance" button near top) and forward the goals to the next step in the system.

FOLLOW-UP FOR SUCCESS

PHASE	ONBOARDING CONTINUED 3-6 Months
Completed ✓ or N/A	
	Provide ongoing coaching and feedback
	Progress Check-In – Sample questions for the Manager to ask the New Hire • How is it going? • How do you feel in your new job? • What are you enjoying most about your role? • Is the job/team/company what you expected? • Has anything surprised you? If so, what? • Has training been helpful? • What would you add or change? • Do you have all the tools and resources that you need? • Do you feel like you have gotten to know your coworkers well? • Do you feel out of the loop about anything? • What should we provide to new employees that we have missed? • What is working/what is not working? • Is anything about your role, the team or department still unclear? • How can I be a better manager to you? • As your manager, what can I do to make your transition easier? • Are there any professional development opportunities you are interested in? • What are your career goals?